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United States
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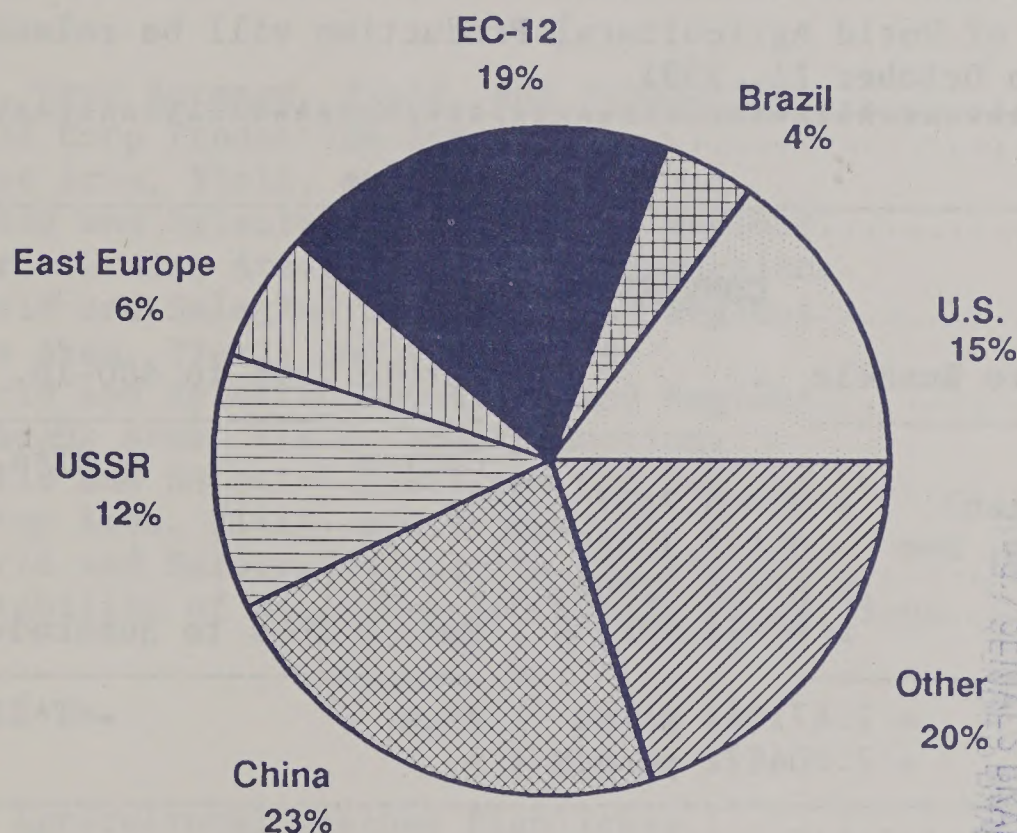
Foreign
Agricultural
Service

Circular Series
WAP 9-91
September 1991

World Agricultural Production

World Red Meat Production 1/

1992 Forecast



1/ Includes carcass-weight-equivalent of beef, veal, pork, sheep, and goat meat.

Production Articles This Month...

World Red Meat

Asian Forestry

World Almonds

Soviet Union Grains

World Filberts

Cote d' Ivoire Grains

Eastern Europe Grains

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-258), September 12, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888 or by FAX (202) 447-7729.

* The next issue of World Agricultural Production will be released at 3 p.m. *
* eastern time on October 11, 1991. *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric Tons to Bushels		:
:	-----		:
:		:	:
:	Wheat & Soybeans	= MT*36.7437	:
:	Corn, Sorghum, Rye	= MT*39.36825	:
:	Barley	= MT*45.929625	:
:	Oats	= MT*68.894438	:
:	-----		:
:	1 hectare	= 2.471044 acres	:
:	1 kilogram	= 2.204622 pounds	:

NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES #
COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST #
GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING #
GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED #
EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN #
COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN #
EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, #
AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH #
DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND #
MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER #
PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE. #
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PRODUCTION HIGHLIGHTS FOR 1991/92

September 1991

WHEAT: World production for 1991/92 is estimated at 550.9 million tons, up 0.4 million, or less than 1 percent from last month, but down 7 percent from last year. Total foreign production is estimated at 496.1 million tons, up 0.9 million or only marginally from last month, but down 4 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 54.8 million tons, down 0.6 million or 1 percent from last month, and down 27 percent from last year. Spring wheat yields were reduced due to disease and excessive rainfall in Minnesota as well as lower harvest results in the Dakotas.
- o Canada Production is estimated at 32.5 million tons, up 1.5 million or 5 percent from last month, but down 1 percent from last year. A recent survey of producers taken by Statistics Canada indicated higher-than-anticipated area. Last year's production was also adjusted upward by 3 percent.
- o EC-12 Production is estimated at 88.5 million tons, down 0.6 million or 1 percent from last month, but up 4 percent from last season. In Spain, dry weather in the northern areas reduced the estimated yield. French wheat yields increased slightly. In Germany, yields were also reduced.
- o Australia Production is estimated at 11.5 million tons, down 0.5 million or 4 percent from last month, and down 25 percent from last year. The decline is the result of a reduction in area and prospective yields due to drought.
- o Syria Production is estimated at 2.0 million tons, up 0.5 million tons, or 33 percent from last month, and up 16 percent from last year. Favorable weather in most growing regions improved yield prospects.

COARSE GRAINS: World production for 1991/92 is estimated at 795.1 million tons, down 3.6 million, a slight decrease from last month, and down 5 percent from last year. Total foreign production is estimated at 581.6 million tons, virtually unchanged from last month, but down 4 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 213.5 million tons, down 3.6 million or 2 percent from last month and down 7 percent from last year. Corn and sorghum yields were reduced due to dryness in the Corn Belt and Plains. Corn production was reduced by 3.1 million tons while sorghum production was lowered by 0.4 million.

o Canada

Production is estimated at 23.6 million tons, down 2.4 million or 9 percent from last month, and down 10 percent from last year. The changes are based on Statistics Canada data that indicated higher area, but lower yield for barley; lower area for oats; lower area and yield for rye; and higher area and yield for mixed grain.

o EC-12

Production is estimated at 87.5 million tons, down 2.0 million or 2 percent from last month, but up 4 percent from last season. In Spain, dry weather severely affected yields for barley, oats, and rye. In Germany, barley, oats, and rye were revised downward, while mixed grain and corn were changed upward. In France, barley yields were revised upward while corn area and yields were reduced.

o Other W. Europe

Production is estimated at 11.8 million tons, down 0.4 million or 3 percent from last month, and down 13 percent from a year ago. An increase in barley area and production in Finland offset decreases in oats area and production. In Sweden, a reduction in barley and oats area reduced coarse grain production.

o Indonesia

Production is estimated at 5.4 million tons, down 0.2 million or 4 percent from last month, but up 2 percent from last year. A prolonged drought in Java reduced the corn estimated harvested area and yield.

o Eastern Europe

Production is estimated at 58.8 million tons, up 0.8 million tons or 1 percent from last month, and up 13 percent from last year's drought reduced harvest. The increase is due to improved production prospects for Hungarian barley and rye as well as Polish barley, mixed grains, and oats; which offset decreases in Hungarian corn and Polish rye production.

o China

Production is estimated at 103.6 million tons, up 4.2 million or 4 percent from last month, but down 9 percent from last year's revised estimate. The corn production estimates for 1990 and 1991 were increased by 8 and 5 percent, respectively. The sorghum production estimates also were raised by 9 and 8 percent. These changes were based on new information from Chinese sources. Area was down, but yields were higher than anticipated for both crops.

RICE (MILLED-BASIS): World production for 1991/92 is forecast at 345.8 million tons, up 1.5 million or slightly above last month, but down 2 percent from last year's record crop. Total foreign production in 1991/92 is projected at 340.8 million tons, up 1.5 million, or slightly above last month, but down 2 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 5.0 million tons, virtually unchanged from last month, but down 3 percent from last year.
- o China Production is estimated at 127.4 million tons, up 1.4 million or 1 percent from last month, but down 4 percent from last year's revised record crop. Chinese provincial officials report that the damage to the rice crop from flooding and drought this summer may not be as bad as originally estimated.
- o Vietnam Production is estimated 11.9 million tons, up 0.5 million or 4 percent from last month, but down 5 percent from last year. An increase in area and favorable weather are seen offsetting the shortage of fertilizer for the harvested winter-spring crop and brown plant hopper infestations.
- o Burma Production is estimated at 7.6 million tons, down 0.5 million or 6 percent from last month, and down 8 percent from last year. Heavy flooding in Irrawaddy and Pegu divisions reduced area.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 218.7 million tons, down 2.1 million or 1 percent from last month, but up 1 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 158.9 million tons, 0.8 million or less than 1 percent from last month, but up nearly 2 percent from last year. Total oilseed production in the United States is forecast at 59.7 million tons, down 1.4 million or 2 percent from last month and down 1 percent from last year.

- * Soybeans: World production for 1991/92 is forecast at 102.0 million tons, down 2.2 million or 2 percent from last month and down 1 percent from last year. Total foreign soybean output is forecast at 52.5 million tons, down 0.8 million from last month or 2 percent, but up 4 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 49.4 million tons, down 1.4 million or 3 percent from last month and down 5 percent from last year. The National Agricultural Statistics Service, USDA, reduced yield projections by nearly 3 percent from last month and down 9 percent from 1990. Above normal temperatures and light rainfall in the Corn Belt States during August reduced yield prospects.

o China Production is estimated at 10.8 million tons, down 0.7 million or 6 percent from last month and down 2 percent from last year's revised estimate. Official government estimates reduced last year's crop from 11.4 tons to 11.0 million. This month's reduction for 1991/92 is based on lower-than-anticipated planted area and flood damage in Anhui, Jiangsu, and Heilongjiang provinces. Yields are down slightly from last season but still higher than the 5-year average.

o Canada Production is estimated at 1.2 million tons, down 0.2 million or 9 percent from last month and down 5 percent from last year. Official government estimates from Statistics Canada revised downward both area and yield.

* Cottonseed: World production for 1991/92 is forecast at 35.0 million tons, up 0.1 million or less than 1 percent from last month and up 4 percent from last year. Total foreign production is forecast at 28.7 million tons, up marginally from last month and up 2 percent from last year. Country highlights are as follows:

o United States Production is estimated at 6.3 million tons, up 0.1 million or 1 percent from last month and up 16 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month slightly increased expected average yield. Favorable weather conditions in the Delta States has enhanced yield potential.

* Peanuts: World production for 1991/92 is forecast at 22.9 million tons, up 0.2 million or 1 percent from last month and up 3 percent from 1990/91. Total foreign production is forecast at 20.6 million tons, up 0.2 million or 1 percent from last month and up nearly 1 percent from last year. Country highlights are as follows:

o United States Production is estimated at a record 2.3 million tons, down 34,000 tons or 1 percent from last month, but up 39 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level but reduced this month's estimate by 1 percent. Yield expectations in Georgia were reduced due to disease pressure, and North Carolina's crop suffered from excessive soil moisture in August.

o China Production is estimated at 6.0 million tons, up 0.2 million or 3 percent from last month, but down 6 percent from last year. Higher yields are expected because of generally good weather this summer in the important peanut-growing province of Shandong.

* Sunflowerseed: World production for 1991/92 is forecast at 21.2 million tons, down 0.2 million or 1 percent from last month and down 4 percent from 1990/91. Total foreign production is forecast at 19.7 million tons, down 0.2 million or 1 percent from last month, and down 6 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 1.5 million tons, unchanged from last month, but up 49 percent from last year. Favorable growing conditions characterized early season growth but there has been some deterioration in recent weeks with hot, dry weather. Harvested area is estimated at 1,025,000 hectares, up 37 percent from 1990/91.
 - o Soviet Union Production is estimated at 6.0 million tons, down 0.6 million or 9 percent from last month and down 9 percent from last year. Hot, dry weather in several important producing regions has significantly lowered yield expectations.
 - o EC-12 Production is estimated at 4.1 million tons, up 0.3 million or 9 percent from last month and up slightly above last year's crop. The increase is attributed to favorable weather in France where production is now expected to be a record. Elsewhere, harvested area in Germany was increased, however, the persistent drought in Spain reduced yield and area estimates.
- * Rapeseed: World production for 1991/92 is forecast at a record 27.2 million tons, up 0.1 million or one-half percent from last month, and up 6 percent from last year. Total foreign production is forecast at 27.1 million tons, up 0.1 million from last month, but up 6 percent from last year. Country highlights are as follows:
- o United States Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the 1991/92 are not survey based estimates but are compiled by the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to initiate for release survey based U.S. rapeseed area estimates in January 1992.
 - o EC-12 Production is estimated at 7.3 million tons, up 0.2 million or 3 percent from last month and up 19 percent from 1990/91. In France, favorable weather throughout the growing season boosted average yield near the record, while Denmark's average yield was reduced by outbreaks of plant disease.
- * Flaxseed: World production for 1991/92 is forecast at 2.1 million tons, down one-half percent from last month and down 11 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 2.0 million tons, down 10,000 tons from the August estimate, and down 12 percent from last 1990/91. There were no significant country changes this month.

- * Copra: World production for 1991/92 is forecast at 4.7 million tons, down 0.1 million or 2 percent from last month and down less than 1 percent from last year. Copra production reached a record 5.3 million in 1985/86. There were no significant country changes this month.
- * Palm Kernels: World production for 1991/92 is forecast at a record 3.5 million tons, down 50,000 tons or 1 percent from last month, but up 5 percent from last year. There were no significant country changes this month.
- * Palm Oil: World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

COTTON: World cotton production in 1991/92 is estimated at a record 91.6 million bales. This estimate is up 0.5 million bales or 1 percent from last month and up 4.6 million bales or 5 percent from 1990/91. The previous record was 89 million bales harvested in 1984/85. Total foreign production is projected at 73.7 million bales, up 0.2 million bales or less than 1 percent from last month and is a gain of 3 percent over 1990/91. This year's crop is second only to the 1984/85 record of 76 million bales. Country highlights are as follows:

- o United States Production is estimated at 17.9 million bales, up 0.2 million bales or 1 percent from last month and up 15 percent above last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. The production increase from the August estimate reflects higher yield expectations. The Delta States of Arkansas, Louisiana, Mississippi, Missouri, and Tennessee account for the largest month-to-month change.
- o Australia Production is estimated at a near record 1.9 million bales, up 0.2 million bales or 12 percent from last month's estimate, but down 2 percent from last year's record output. The production increase is a reflection of an expected increase in area.
- o Turkey Production is estimated at 2.7 million bales, up 0.2 million bales or 7 percent from last month's estimate, but down 10 percent from last year's production level. Cotton continues to make very good progress in virtually all regions under good growing conditions.
- o Greece Production is estimated at 0.8 million bales, down 0.1 million or 14 percent from last month and down 14 percent from last year. Reduced area and excessive rain throughout the season have deteriorated production prospects.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION				
	Prel.		Proj.	Prel.		Proj.	Prel.		1991/92 Proj.	Prel.		1991/92 Proj.		
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sep.	1989/90	1990/91	Aug.	Sep.
	--Million Acres--			--Million Acres--			--Bushels per Acre--			--Million Bushels--				
All Wheat	76.6	77.3	70.0	62.2	69.4	58.1	32.7	39.5	35.0	34.6	2,037	2,739	2,033	2,013
	55.1	57.0	51.0	41.5	50.0	39.5	35.0	40.7	34.7	34.7	1,455	2,033	1,372	1,372
	21.5	20.3	19.0	20.7	19.4	18.6	28.1	36.4	35.6	34.5	582	705	661	641
	2.0	1.6	1.7	0.5	0.4	0.4	28.2	23.3	27.6	27.6	14	10	12	12
Soybeans	60.8	57.8	59.8	59.5	56.5	58.6	32.3	34.0	31.8	31.0	1,924	1,922	1,869	1,817
Corn	72.2	74.2	75.9	64.7	67.0	68.7	116.3	118.5	107.8	106.1	7,525	7,933	7,418	7,295
Sorghum	12.6	10.5	11.0	11.1	9.1	9.7	55.4	62.9	57.9	56.2	615	571	565	548
Barley	9.1	8.2	8.9	8.3	7.5	8.4	48.6	55.9	55.8	55.5	404	419	470	468
Oats	12.1	10.4	8.6	6.9	5.9	5.0	54.3	60.1	52.2	52.2	374	357	260	260
							--Pounds per Acre--			--Million CWT--				
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,507	5,544	5,563	154.5	154.9	157.0	157.5
										--Million 480-Pound--				
All Cotton	10.6	12.3	14.1	9.5	11.7	13.4	614	634	630	638	12.2	15.5	17.6	17.9

1/ Except for estimated rye production, all estimates are from the USDA National Agricultural Statistics Service (NASS) for 1989/90, 1990/91 and 1991/92. Production and yield estimates for rye are from the USDA Interagency Commodity Estimates Committee.

SEPTEMBER 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America		Europe			USSR	Asia				South America		Selected Other		All Other Countries			
			United States		Canada	Mexico	EC-12		Oth. W. Europe	Eastern Europe	China	India	Indo-Pakistan	Thailand	Argentina	Brazil		Australia	South Africa	Turkey
			—Million Metric Tons—																	
<u>Wheat</u> 1989/90 1990/91 prel. 1991/92 proj. August September	537.6	482.2	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
	593.8	519.3	74.5	32.7	3.9	84.7	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.4	1.7	15.0	17.9
	550.5	495.2	55.3	31.0	3.5	89.0	4.1	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	12.0	2.0	16.0	17.7
	550.9	496.1	54.8	32.5	3.5	88.5	4.0	39.4	85.5	94.0	54.0	0.0	14.5	0.0	9.0	3.2	11.5	2.1	16.0	18.2
<u>Coarse Grains</u> 1989/90 1990/91 prel. 1991/92 proj. August September	800.3	579.0	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	79.4
	834.7	604.1	230.6	26.1	18.4	84.1	13.6	52.2	113.3	113.5	35.0	5.3	2.9	4.1	11.2	24.2	6.9	8.5	8.9	76.2
	798.6	581.6	217.1	25.9	16.8	89.5	12.2	58.0	91.5	99.4	32.5	5.6	2.4	4.1	10.1	26.7	7.4	8.6	9.7	81.1
	795.1	581.6	213.5	23.6	16.8	87.5	11.8	58.8	91.5	103.6	32.5	5.4	2.5	4.0	10.2	26.7	7.3	8.6	9.7	81.1
<u>Rice (Milled)</u> 1989/90 1990/91 prel. 1991/92 proj. August September	344.6	339.5	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.7	0.0	0.2	23.2
	352.3	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	75.0	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.7
	344.2	339.3	5.0	0.0	0.2	1.5	0.0	0.1	1.7	126.0	73.0	28.9	3.2	13.2	0.2	6.8	0.6	0.0	0.2	23.2
	345.8	340.8	5.0	0.0	0.2	1.5	0.0	0.1	1.7	127.4	73.0	28.9	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.1
<u>Total Grains 1/</u> 1989/90 1990/91 prel. 1991/92 proj. August September	1,682.6	1,400.7	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	194.2
	1,780.8	1,470.6	310.2	58.8	22.5	170.4	18.7	93.5	222.9	344.2	159.6	34.7	20.4	15.5	22.0	33.7	22.8	10.2	24.1	196.8
	1,693.4	1,416.0	277.4	56.9	20.5	180.0	16.3	97.6	178.7	319.4	159.5	34.5	20.1	17.3	19.3	36.7	20.0	10.6	25.9	202.7
	1,691.7	1,418.5	273.2	56.1	20.5	177.5	15.8	98.3	178.7	325.0	159.5	34.3	20.3	17.2	19.4	36.7	19.6	10.7	25.9	203.2
<u>Oilseeds 2/</u> 1989/90 1990/91 prel. 1991/92 proj. August September	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
	216.8	156.2	60.5	5.6	1.0	13.0	0.7	4.3	13.0	33.2	20.4	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.3
	220.8	159.7	61.1	6.3	1.1	13.2	0.7	4.2	12.9	33.7	20.2	2.3	3.8	0.7	15.6	19.1	1.0	1.0	1.6	22.3
	218.7	158.9	59.7	6.2	1.1	13.7	0.7	4.2	12.3	33.2	20.2	2.3	3.8	0.7	15.5	19.1	1.1	1.0	1.6	22.2
—Million 480-Pound Bales—																				
<u>Cotton</u> 1989/90 1990/91 prel. 1991/92 proj. August September	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
	87.0	71.5	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.2	0.0	7.5	0.1	1.3	3.1	1.9	0.2	3.0	10.2
	91.1	73.5	17.6	0.0	1.0	1.3	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.7	0.3	2.5	10.5
	91.6	73.7	17.9	0.0	1.0	1.2	0.0	0.1	11.3	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.9	0.3	2.7	10.5

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 190.0 million forecast in 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.

Note: Entries of 0.0 indicate no reported or insignificant production.

TABLE 3

Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Aug.	1991/92 Sept	Prel. 1989/90	1990/91	1991/92 Aug.	1991/92 Sept
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.3	231.9	223.4	2.38	2.56	2.46	2.47	537.6	593.8	550.5	550.9
United States	25.2	28.1	23.5	2.20	2.66	2.35	2.33	55.4	74.5	55.3	54.8
Total Foreign	201.1	203.8	199.9	2.40	2.55	2.47	2.48	482.2	519.3	495.2	496.1
Maj. Foreign Exporters	45.1	45.8	44.3	2.91	3.13	3.21	3.20	131.0	143.3	141.0	141.5
Argentina	5.5	5.7	4.9	1.86	1.84	1.84	1.84	10.2	10.5	9.0	9.0
Australia	9.0	9.2	7.8	1.58	1.67	1.50	1.47	14.2	15.4	12.0	11.5
Canada	13.6	14.4	14.7	1.80	2.27	2.20	2.21	24.6	32.7	31.0	32.5
EC-12	17.0	16.5	16.9	4.83	5.14	5.24	5.25	82.0	84.7	89.0	88.5
Major Importers	96.4	98.1	95.6	2.48	2.67	2.46	2.46	238.8	261.4	235.3	235.2
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.7	3.04	3.19	3.06	3.06	90.8	98.2	94.0	94.0
Eastern Europe	9.8	9.7	9.8	4.14	4.22	4.03	4.02	40.7	41.1	39.4	39.4
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.7	5.1	5.2	1.13	1.11	1.44	1.44	5.3	5.6	7.5	7.5
Japan	0.3	0.3	0.2	3.47	3.66	3.51	3.51	1.0	1.0	0.9	0.9
USSR	47.7	48.2	46.5	1.94	2.24	1.84	1.84	92.3	108.0	85.5	85.5
Other Foreign	59.7	60.0	60.1	1.88	1.91	1.96	1.99	112.4	114.5	118.8	119.4
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	3.98	4.0	3.9	3.5	3.5
Non-EC W. Europe	0.8	0.9	0.8	5.19	5.48	5.01	5.16	4.4	5.1	4.1	4.0
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.08	1.48	2.0	1.7	2.0	2.1
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.8	10.0	9.7	1.76	1.79	1.83	1.88	15.4	17.9	17.7	18.2

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Aug. Sept		1989/90	Prel. 1990/91	1991/92 Proj. Aug. Sept	
<i>TOTAL COARSE GRAINS</i>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	321.0	319.0	320.4	2.49	2.62	2.49	2.48	800.3	834.7	798.6	795.1
United States	37.0	36.4	37.4	5.98	6.34	5.81	5.71	221.4	230.6	217.1	213.5
Total Foreign	284.0	282.6	283.0	2.04	2.14	2.05	2.06	579.0	604.1	581.6	581.6
Maj. Foreign Exporters	21.3	20.7	21.5	2.46	2.74	2.57	2.50	52.5	56.7	56.0	53.7
Argentina	3.2	3.3	3.6	2.64	3.43	2.88	2.86	8.3	11.2	10.1	10.2
Australia	4.0	4.2	4.8	1.73	1.65	1.53	1.53	6.8	6.9	7.4	7.3
Canada	8.3	7.9	7.6	2.84	3.30	3.31	3.09	23.5	26.1	25.9	23.6
South Africa	4.4	3.8	4.0	2.18	2.20	2.07	2.15	9.5	8.5	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.72	2.65	4.3	4.1	4.1	4.0
Major Importers	103.8	99.8	100.5	2.72	2.84	2.68	2.67	282.9	283.1	269.6	267.9
Eastern Europe	16.5	15.9	16.2	3.66	3.28	3.63	3.63	60.2	52.2	58.0	58.8
EC-12	20.3	19.3	19.0	4.43	4.36	4.66	4.59	89.8	84.1	89.5	87.5
Other W. Europe	3.1	3.0	2.8	3.97	4.49	4.10	4.16	12.4	13.6	12.2	11.8
Mexico	7.5	8.2	8.5	1.88	2.23	1.98	1.98	14.1	18.4	16.8	16.8
USSR	56.0	52.9	53.5	1.87	2.14	1.71	1.71	104.8	113.3	91.5	91.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	158.9	162.1	161.0	1.53	1.63	1.59	1.62	243.6	264.3	256.0	260.0
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	28.6	3.31	3.90	3.52	3.62	93.5	113.5	99.4	103.6
India	37.7	38.9	37.6	0.92	0.90	0.86	0.86	34.6	35.0	32.5	32.5
Indonesia	2.7	2.9	3.0	1.85	1.83	1.84	1.83	5.0	5.3	5.6	5.4
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	59.8	60.0	60.1	1.14	1.11	1.15	1.15	67.9	66.5	68.9	69.0
<i>BARLEY</i>											
World	74.7	73.8	76.5	2.27	2.53	2.28	2.25	169.8	186.3	174.1	172.5
United States	3.4	3.0	3.4	2.62	3.00	3.00	2.99	8.8	9.1	10.2	10.2
Total Foreign	71.4	70.7	73.1	2.26	2.51	2.25	2.22	161.0	177.2	163.8	162.3
Australia	2.3	2.5	2.8	1.75	1.65	1.50	1.50	4.0	4.2	4.4	4.2
Canada	4.7	4.8	4.9	2.50	2.97	3.09	2.68	11.7	14.2	14.5	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.82	3.82	14.5	14.3	13.8	14.4
EC-12	12.6	12.3	12.0	4.05	4.13	4.18	4.15	51.0	50.8	50.3	49.7
Other W. Europe	1.5	1.5	1.5	3.87	4.35	3.91	3.90	5.9	6.4	5.9	5.9
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.65	1.65	48.5	61.0	47.0	47.0
Others	12.4	13.3	13.0	1.19	1.11	1.20	1.20	14.8	14.7	15.5	15.6

FOOTNOTES AT END OF TABLE

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. Aug.	Sept	Prel. 1989/90	1990/91	1991/92 Proj. Aug.	Sept
<u>CORN</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.1	127.1	129.8	3.66	3.76	3.62	3.61	460.9	477.9	469.4	468.5
United States	26.2	27.1	27.8	7.30	7.44	6.77	6.66	191.2	201.5	188.4	185.3
Total Foreign	99.9	100.0	102.0	2.70	2.76	2.76	2.78	269.7	276.4	281.0	283.2
Maj. Foreign Exporters	6.7	6.4	6.8	2.72	3.05	2.75	2.79	18.2	19.5	19.0	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.6	3.1	3.3	2.47	2.55	2.35	2.46	8.9	7.9	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.88	2.80	4.1	3.8	3.8	3.7
Major Importers	21.2	19.7	21.3	3.93	3.50	3.90	3.85	83.3	68.8	83.5	82.0
Eastern Europe	7.1	6.5	6.6	4.14	3.26	4.29	4.27	29.2	21.1	28.3	28.2
EC-12	3.9	3.4	3.9	6.91	6.27	7.07	6.95	26.9	21.6	28.3	26.8
Other W. Europe	0.2	0.2	0.2	7.68	7.91	7.88	7.88	1.7	1.8	1.7	1.7
Mexico	5.8	6.6	7.0	1.68	2.14	1.83	1.83	9.8	14.1	12.8	12.8
USSR	4.1	2.8	3.5	3.71	3.50	3.43	3.43	15.3	9.8	12.0	12.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.0	74.0	74.0	2.34	2.54	2.42	2.46	168.2	188.1	178.4	182.3
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.00	6.06	6.4	7.2	6.6	6.6
China	20.4	21.4	21.0	3.88	4.52	4.08	4.19	78.9	96.8	84.0	88.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	5.9	5.7	1.61	1.61	1.49	1.49	9.4	9.5	8.5	8.5
Indonesia	2.7	2.9	3.0	1.85	1.83	1.84	1.83	5.0	5.3	5.6	5.4
Philippines	3.6	3.8	3.9	1.24	1.24	1.24	1.24	4.5	4.7	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.3	24.0	24.3	1.47	1.46	1.49	1.49	35.7	34.9	36.1	36.2
<u>SORGHUM</u>											
World	40.6	39.6	39.9	1.35	1.36	1.33	1.33	54.8	53.6	53.1	53.0
United States	4.5	3.7	3.9	3.48	3.95	3.64	3.53	15.6	14.5	14.3	13.9
Total Foreign	36.1	35.9	35.9	1.08	1.09	1.08	1.09	39.1	39.1	38.8	39.1
Argentina	0.7	0.7	0.7	2.86	3.57	2.86	2.86	2.0	2.5	2.0	2.0
Australia	0.4	0.5	0.6	2.27	1.95	2.00	1.92	0.9	0.9	1.0	1.1
China	1.6	1.5	1.5	2.72	3.71	3.17	3.47	4.4	5.7	5.0	5.2
India	14.9	15.0	15.0	0.86	0.83	0.83	0.83	12.9	12.5	12.5	12.5
Mexico	1.3	1.3	1.2	2.88	2.85	2.92	2.92	3.8	3.7	3.5	3.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	3.1	3.0	3.0	0.52	0.50	0.50	0.50	1.6	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.2	9.1	9.2	1.03	1.00	1.01	1.01	9.5	9.1	9.3	9.3

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. Aug.	Sept	Prel. 1989/90	1990/91	1991/92 Proj. Aug.	Sept
<u>OATS</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.4	1.83	1.98	1.79	1.75	41.4	42.3	37.8	35.7
United States	2.8	2.4	2.0	1.95	2.16	1.87	1.87	5.4	5.2	3.8	3.8
Total Foreign	19.8	18.9	18.4	1.82	1.96	1.78	1.74	36.0	37.1	34.0	31.9
USSR	10.8	10.7	10.5	1.57	1.68	1.43	1.43	16.8	18.0	15.0	15.0
Maj. Foreign Exporters	3.7	3.0	3.0	1.97	2.17	2.10	2.03	7.3	6.4	7.2	6.1
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.44	1.48	1.38	1.38	1.6	1.6	1.8	1.8
Canada	1.7	1.2	1.0	2.08	2.34	2.44	2.42	3.5	2.9	3.3	2.4
Sweden	0.4	0.4	0.3	3.54	4.42	3.86	4.09	1.5	1.6	1.6	1.4
Other Foreign	5.4	5.3	4.9	2.21	2.41	2.30	2.22	11.9	12.6	11.8	10.9
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.56	2.54	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.70	2.67	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	3.02	2.89	4.8	5.1	4.9	4.2
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.44	4.44	2.0	2.4	2.4	1.7
Finland	0.4	0.5	0.3	3.24	3.67	3.28	3.23	1.4	1.7	1.3	1.1
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.12	1.09	1.11	1.11	1.4	1.4	1.4	1.4
<u>RYE</u>											
World	16.9	16.6	13.5	2.22	2.33	2.22	2.21	37.6	38.7	30.1	29.7
United States	0.2	0.2	0.2	1.77	1.70	1.73	1.73	0.3	0.3	0.3	0.3
Total Foreign	16.7	16.5	13.3	2.23	2.34	2.23	2.21	37.2	38.5	29.8	29.4
USSR	10.7	10.4	8.0	1.87	2.02	1.75	1.75	20.1	21.0	14.0	14.0
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.68	1.69	1.78	0.9	0.7	0.5	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.85	2.82	9.7	9.9	9.6	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.22	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.85	2.82	8.6	8.8	8.6	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.83	3.66	5.2	5.4	4.7	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.84	4.84	0.5	0.5	0.5	0.5
Germany	1.0	1.0	0.7	3.86	3.87	4.93	4.64	3.9	4.0	3.5	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.17	2.20	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA		YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	Prel. 1989/90	Proj. 1991/92	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. Aug.	Sept	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. Aug.	Sept	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. Aug.	Sept	Prel. 1989/90	Prel. 1990/91	1991/92 Proj. Aug.	Sept
	—Million Hectares—		—Metric Tons Per Hectare—				—Million Metric Tons—				—In Percent—				—Million Metric Tons—			
World	146.4	146.9	147.0				508.7	519.8	508.6	510.5	67.7	67.8	67.7	67.7	344.6	352.3	344.2	345.8
United States	1.1	1.1	1.1															
				3.5	3.5	3.5												
Total Foreign	145.3	145.8	145.9				501.7	512.8	501.5	503.3	67.7	67.7	67.6	67.5	339.5	347.2	339.3	340.8
Maj. Foreign Exporters																		
Burma	16.8	16.6	16.6				38.5	35.9	38.2	37.6	64.0	63.8	64.0	64.1	24.6	22.9	24.4	24.1
Pakistan	4.7	4.8	4.5				13.5	13.7	13.4	12.6	60.0	60.0	60.0	60.0	8.1	8.2	8.0	7.6
Thailand	2.1	2.1	2.1				4.8	4.9	4.8	5.0	66.7	66.7	66.7	66.7	3.2	3.3	3.2	3.3
	10.0	9.7	10.0				20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	13.3	11.4	13.2	13.2
Major Importers																		
EC-12	13.9	13.9	13.6				58.6	58.4	57.7	57.6	66.1	66.0	66.1	66.1	38.7	38.6	38.1	38.1
Indonesia	0.3	0.4	0.4				2.1	2.4	2.3	2.3	67.0	67.4	67.4	67.4	1.4	1.6	1.5	1.5
Nigeria	10.5	10.5	10.2				44.7	45.2	44.5	44.4	65.0	65.0	65.0	65.0	29.1	29.4	28.9	28.9
Republic of Korea	0.6	0.7	0.7				0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	0.5	0.6	0.6	0.6
Other Maj. Import. 1/	1.3	1.2	1.2				8.1	7.7	7.8	7.8	72.8	72.6	72.7	72.7	5.9	5.6	5.7	5.7
	1.2	1.1	1.1				2.8	2.2	2.2	2.2	65.5	65.4	65.7	65.8	1.8	1.4	1.5	1.5
Other Foreign	114.6	115.3	115.7				404.6	418.5	405.6	408.2	68.3	68.3	68.2	68.3	276.1	285.8	276.7	278.6
Australia	0.1	0.1	0.1				0.9	0.8	0.9	1.1	71.5	71.5	71.5	71.5	0.7	0.6	0.6	0.8
Bangladesh	10.5	10.4	10.5				26.8	26.9	27.6	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.4	18.4
Brazil	4.3	4.5	5.3				7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	4.9	6.3	6.8	6.8
China	32.7	33.1	32.6				180.1	189.3	180.0	182.0	70.0	70.0	70.0	70.0	126.1	132.5	126.0	127.4
India	42.2	42.2	42.0				111.1	112.5	109.5	109.5	66.7	66.7	66.7	66.7	74.1	75.0	73.0	73.0
Japan	2.1	2.1	2.1				12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	9.4	9.6	9.4	9.4
Philippines	3.4	3.5	3.6				8.9	9.4	9.5	9.5	65.0	65.0	65.0	65.0	5.8	6.1	6.2	6.2
USSR	0.7	0.6	0.7				2.6	2.4	2.6	2.6	65.0	65.0	65.0	65.0	1.7	1.6	1.7	1.7
Vietnam	5.7	5.7	5.9				19.0	19.0	17.5	18.0	66.0	66.0	65.0	66.0	12.5	12.5	11.4	11.9
Others	12.9	13.2	12.9				35.0	35.8	35.1	34.9	66.1	66.2	66.1	66.2	23.2	23.7	23.2	23.1

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.		
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
<u>SOYBEANS</u>											
World	58.26	54.01	55.44	1.84	1.91	1.86	1.84	107.27	102.98	104.22	101.99
United States	24.09	22.87	23.73	2.17	2.29	2.14	2.08	52.35	52.30	50.86	49.45
Total Foreign	34.16	31.15	31.72	1.61	1.63	1.66	1.66	54.92	50.68	53.36	52.54
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.75	16.72	1.34	1.46	1.46	1.45	23.83	24.38	25.11	24.29
Canada	0.54	0.49	0.58	2.26	2.64	2.33	2.14	1.22	1.29	1.35	1.23
China	8.06	7.56	7.50	1.27	1.46	1.45	1.44	10.23	11.00	11.50	10.80
Eastern Europe	0.70	0.36	0.28	0.97	1.07	1.30	1.30	0.68	0.39	0.36	0.36
EC-12	0.63	0.69	0.58	3.13	3.12	3.14	3.14	1.98	2.17	1.81	1.81
India	2.13	2.30	2.40	0.80	1.04	1.00	1.00	1.72	2.40	2.40	2.40
Indonesia	1.21	1.24	1.26	1.09	1.09	1.11	1.11	1.32	1.35	1.40	1.40
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.74	2.39	2.42	1.52	1.51	1.56	1.56	4.17	3.61	3.77	3.78
<u>COTTONSEED</u>											
World	32.05	33.51	34.92	0.96	1.00	1.00	1.00	30.92	33.59	34.87	34.97
United States	3.86	4.75	5.44	1.10	1.14	1.14	1.15	4.24	5.41	6.19	6.26
Total Foreign	28.19	28.77	29.48	0.95	0.98	0.97	0.97	26.68	28.18	28.68	28.71
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.33	7.60	7.80	0.60	0.53	0.54	0.54	4.40	4.00	4.20	4.20
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.00	1.53	1.56	1.53	1.53	5.11	4.92	4.60	4.60
Others	9.73	9.74	9.90	0.80	0.85	0.84	0.84	7.82	8.32	8.32	8.35
<u>PEANUTS</u>											
World	19.82	19.47	19.92	1.11	1.14	1.14	1.15	22.06	22.11	22.69	22.86
United States	0.67	0.73	0.79	2.72	2.23	2.91	2.87	1.81	1.63	2.31	2.28
Total Foreign	19.16	18.74	19.13	1.06	1.09	1.07	1.08	20.25	20.48	20.38	20.58
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	3.02	1.81	2.19	1.92	1.99	5.37	6.37	5.80	6.00
India	8.71	8.10	8.30	0.93	0.90	0.92	0.92	8.09	7.30	7.60	7.60
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.89	5.99	6.10	0.87	0.87	0.88	0.88	5.13	5.21	5.35	5.35

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Aug.	Sept	1989/90	1990/91	Aug.	Sept
<u>SUNFLOWERSEED</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	15.88	15.89	15.97	1.38	1.39	1.36	1.33	21.87	22.02	21.43	21.23
United States	0.72	0.75	1.03	1.10	1.38	1.50	1.50	0.80	1.03	1.54	1.54
Total Foreign	15.16	15.14	14.94	1.39	1.39	1.35	1.32	21.07	20.98	19.89	19.69
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.13	2.55	2.39	1.67	1.61	1.66	1.71	3.54	4.09	3.75	4.10
East Europe	1.27	1.23	1.17	1.81	1.70	1.77	1.77	2.29	2.09	2.08	2.08
USSR	4.46	4.67	4.60	1.59	1.41	1.43	1.30	7.07	6.56	6.60	6.00
Others	3.80	3.70	3.57	0.87	0.85	0.80	0.80	3.32	3.15	2.81	2.87
<u>RAPSEED</u>											
World	17.12	18.12	19.89	1.28	1.42	1.37	1.37	21.85	25.67	27.09	27.22
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.09	19.83	1.28	1.42	1.36	1.37	21.80	25.62	26.99	27.11
Canada	2.90	2.58	3.27	1.07	1.27	1.31	1.28	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.43	2.96	2.89	2.94	3.00	5.34	6.14	7.07	7.28
East Europe	0.81	0.74	0.69	2.66	2.38	2.48	2.41	2.15	1.75	1.69	1.66
India	4.99	5.60	5.70	0.83	1.02	0.88	0.88	4.12	5.70	5.00	5.00
Others	1.59	1.54	1.65	1.04	1.16	1.12	1.14	1.65	1.78	1.93	1.88
<u>FLAXSEED</u>											
World	3.74	3.79	3.51	0.50	0.62	0.58	0.59	1.85	2.34	2.10	2.09
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.69	3.39	0.50	0.61	0.57	0.58	1.82	2.24	1.98	1.97
Argentina	0.58	0.58	0.45	0.90	0.83	0.84	0.84	0.52	0.48	0.46	0.38
Canada	0.60	0.73	0.54	0.83	1.29	1.16	1.30	0.50	0.94	0.63	0.70
India	1.18	1.20	1.20	0.29	0.33	0.33	0.33	0.34	0.40	0.40	0.40
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.77	0.89	0.89	0.24	0.26	0.32	0.31
<u>MAJOR OILSEEDS</u>	146.87	144.80	149.65	1.40	1.44	1.42	1.41	205.83	208.71	212.40	210.36
United States	29.44	29.23	31.17	2.01	2.07	1.96	1.92	59.29	60.53	61.12	59.75
Total Foreign	117.43	115.57	118.48	1.25	1.28	1.27	1.27	146.54	148.18	151.28	150.61
<u>COPRA</u>	--	--	--	--	--	--	--	4.90	4.74	4.81	4.71
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.33	3.31	3.59	3.59
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	214.07	216.76	220.80	218.66
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	10.91	11.04	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.

TABLE 7

Cotton Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Aug.	Proj. Sept	Prel. 1989/90	1991/92 1990/91	Proj. Aug.	Proj. Sept
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.3	34.8	552	569	570	573	80.0	87.0	91.1	91.6
United States	3.9	4.7	5.4	688	711	706	715	12.2	15.5	17.6	17.9
Total Foreign	27.7	28.6	29.4	533	545	545	547	67.8	71.5	73.5	73.7
Maj. Foreign Exporters	13.1	13.2	13.6	727	790	775	780	43.7	48.0	48.4	48.7
Australia	0.2	0.3	0.3	1,326	1,563	1,322	1,379	1.4	1.9	1.7	1.9
Central America 1/	0.1	0.1	0.1	832	802	793	793	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	755	755	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	913	837	837	0.8	0.8	1.0	1.0
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	498	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	887	956	2.8	3.0	2.5	2.7
USSR	3.3	3.2	3.0	805	827	817	817	12.3	12.0	11.3	11.3
Major Importers 2/	0.4	0.4	0.3	887	801	911	833	1.5	1.5	1.4	1.3
Other Foreign	14.2	14.9	15.4	346	321	334	334	22.6	22.0	23.6	23.6
Argentina	0.6	0.6	0.6	486	444	465	465	1.3	1.3	1.3	1.3
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.6	7.8	315	264	279	279	10.6	9.2	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.9	358	370	368	368	7.0	7.7	8.2	8.2

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

SEPTEMBER 1991

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 10-year record of the difference between the September projections and the final estimates. Using world wheat production as an example, changes between the September projection and the final estimate have averaged 10.9 million tons (2.2 percent) and ranged from -30.7 to 6.8 million tons. The September projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1990/91 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million Metric Tons---			Number of Years 2/	
<i>WHEAT</i>						
World	2.2	10.9	-30.7	6.8	6	4
U.S.	0.8	0.5	-1.2	0.8	5	5
Foreign	2.6	11.2	-30.9	7.5	6	4
<i>COARSE GRAINS 3/</i>						
World	1.1	8.5	-22.6	11.3	8	2
U.S.	2.7	5.3	-12.9	6.1	7	3
Foreign	1.4	8.0	-18.9	9.1	5	5
<i>RICE (Milled)</i>						
World	2.7	8.5	-24.1	3.4	9	1
U.S.	4.7	0.2	-0.4	0.3	7	3
Foreign	2.7	8.4	-24.4	3.6	9	1
<i>SOYBEANS</i>						
World	2.6	2.4	-4.4	4.7	4	6
U.S.	4.0	2.0	-2.7	4.6	5	5
Foreign	5.1	2.2	-3.2	4.2	4	6
			---Million 480-lb. Bales---			
<i>COTTON</i>						
World	3.0	2.4	-10.9	4.5	5	5
U.S.	4.5	0.6	-1.9	0.8	5	4
Foreign	3.2	2.2	-11.2	3.7	5	5
<i>UNITED STATES</i>			-----Million Bushels-----			
<i>CORN</i>	5.5	316	-599	1,071	6	4
<i>SORGHUM</i>	6.1	44	-82	83	7	3
<i>BARLEY</i>	3.2	16	-16	46	5	5
<i>OATS</i>	4.7	19	-26	57	4	6

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.

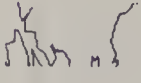



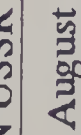



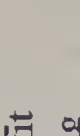

2/ May not total ten if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

SEPTEMBER 12, 1991

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY

CANADA	EUROPE	NEW LANDS
 <p>Mostly dry, warm weather in late August favors grain and oilseed harvesting. Recent freezing weather had little impact on maturing crops.</p>	 <p>Favorable harvest weather prevails across the north and east. Recent showers and cooler weather in Spain and France ease crop stress. Corn is maturing.</p>	 <p>Above-normal precipitation in August eases drought conditions, benefiting immature crops. The spring grain harvest is off to a slow start because crops are ripening later than usual.</p>
UNITED STATES	WESTERN USSR	EASTERN ASIA
 <p>Showers across the corn belt reduce moisture stress while warm temperatures promote rapid crop development in western sections. Mostly favorable weather for crops prevails elsewhere. Winter wheat planting is underway with limited moisture in central Plains.</p>	 <p>Widespread rain in August benefits immature crops and increases preplanting moisture for 1992 winter grain crops.</p>	 <p>Tropical storms soak southern China and South Korea. Recent wetness in the North China Plain slows crop harvests.</p>
SOUTH AMERICA	SOUTH ASIA	SOUTHEAST ASIA
 <p>In Argentina, periodic rain favors wheat growth. In Brazil, rain is needed for corn planting, and coffee and citrus flowering.</p>	 <p>Favorable conditions prevail in central and eastern grain and oilseed areas for reproductive to filling crops. Moisture is limited for late planted grains and oilseeds in the northwest and for establishment of fall planted crops in the southern interior.</p>	 <p>Frequent, heavy showers benefit late Thai rice but cause flooding along the Mekong. Rain also helps immature grains over the Philippines but cause some flooding in northwestern rice areas.</p>
		AUSTRALIA
		 <p>Drought prevails in Queensland and northern New South Wales since late July. Wheat is advancing into reproduction in need of moisture.</p>

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917.)

WEATHER BRIEFS

SOUTHERN BRAZIL: DRYNESS BECOMING A CONCERN

Rainfall has been below normal and temperatures have been mostly above normal across central and southern Brazil from August 12 - September 11, 1991. Dry conditions have stressed winter wheat in some regions of Rio Grande do Sul and poor soil moisture has caused concern for on-going corn planting in Parana. As of September 12, citrus and coffee are entering their flowering stages and will increase their moisture needs as fruit set. Precipitation has been generally 25 - 50 percent of normal for the months of July and August and substantial rain is needed to improve conditions.

CENTRAL AMERICA: RAINS RETURN

A return to normal-to-above-normal rainfall levels occurred across Guatemala, Honduras and El Salvador during the period of August 27 to September 12. Rainfall had been less than 50 percent of normal across this region for eight weeks prior to August 27. This dry period had adverse effects on summer crops and low reservoir and river levels caused reductions in irrigation and hydroelectric generation. Precipitation was generally above normal this past Spring boosting residual soil moisture somewhat and minimizing the negative impact of the dry period on crops.

SOUTHEAST ASIA: HEAVY RAINS AND DROUGHTS

Normal-to-well-above normal rain not only ended dry conditions across summer crop growing regions of Thailand, Laos, Cambodia, and Vietnam, but caused major flooding along the Mekong River. Rainfall was very heavy during August 17 through September 12, which started with Typhoon Fred dropping as much as 240 millimeters of rain across the region.

Throughout the northern Philippines rainfall was very heavy from August 11 through September 12. Precipitation has been particularly persistent across western Luzon, where rain run-off and thick layers of ash from the Mt. Pinatubo Volcano caused severe damage to villages due to mud flows and landslides. Moderate rainfall, 20-40 millimeters, improved grain planting conditions in northeastern Luzon during the week of September 1 - 7. As of September 12, the central and southern Philippines are becoming too dry.

Rainfall has been seasonably increasing across Malaysia, Sumatra, and Borneo, as of September 12. However, showers have failed to reach the island of Java. A timely start to the rainy season, which should begin around September 15, is crucial to southern Indonesia following this season's failure of secondary rains to develop. Main-season rice planting usually begins in October.

PRODUCTION BRIEFS

SOUTH AFRICA: LAND DIVERSION SCHEME TO END IN OCTOBER

South Africa's land diversion scheme, announced in 1987, will end in October. The scheme to remove about 1 million hectares of marginal land from grain production and put it under pasture is considered by the Government of South Africa as successful since 700,000 to 800,000 hectares of land are expected to be converted by the end of next month. To date, 7,000 farmers have already converted 403,000 hectares, while another 244,000 hectares are in the process of being changed. A late rush to register land is expected as farmers divert their land to collect the \$63 per hectare subsidy. Since marginal land is taken out of production, corn will now be produced on better soils and average yields should improve.

INDONESIA: PROLONGED DRYNESS IN JAVA HURTS RICE CROP

Indonesia's second (minor season) rice crop has been damaged by dry weather in Java. Most of the fields affected by the drought are marginal land. Some are not irrigated and some are irrigated but cannot expect adequate water supplies because they are either far from a water source or supplied by small reservoirs currently operating at a fraction of their capacity. The U.S. agriculture attache in Jakarta reported that crops on some marginal land have been abandoned and other fields have been cut for fodder or opened to livestock for grazing. Milled rice production is forecast down 50,000 tons this month to 28.85 million tons. Harvested area is reduced by 100,000 hectares to 10.30 million. The dry weather is seriously depleting Java's irrigation reservoirs; recharging will be needed as farmers prepare their fields for the start of the main season crop beginning in October.

THAILAND: RICE PLANTINGS BENEFIT FROM RECENT RAIN

Heavy rains from tropical storm Fred benefited Thailand's main season rice crop. According to the U.S. agricultural attache in Bangkok, the the upper and central portions of the Northeast Region now have adequate moisture and planting is 70 percent completed. While rains during August also improved the situation in the lower Northeast Region that area remains a little dry. The Northern Region also received beneficial rains in August. There are reports of flooding the Northern Region, but damage is not believed to be significant. Rice plantings are 2-4 weeks behind normal because of earlier dryness. With the recent rains, plantings should be completed by mid-September and normal yields are expected. Infestations of brown planthopper have been seen in a couple of provinces, but no significant problems are reported.

WORLD: SUGAR PRODUCTION REVISED UPWARD

World 1991/92 centrifugal sugar production has been revised upward to 113.2 million tons (raw basis), 640,000 tons more than forecast in May 1991 (see WAP 5-91). This compares with the revised 1990/91 outturn of 112.8 million tons. Major increases for 1991/92 since the May report are: India, 800,000 tons to 13.5 million; Brazil, 600,000 tons to 8.5 million; Turkey 250,000 tons to 2.0 million; and China 200,000 to 7.0 million. Partially offsetting the increases are areas where prospects have declined since the May report: Cuba, 300,000 tons to 7.5 million; and the European Community, 365,000 tons to 16.3 million. The largest percentage change occurred in Sweden, down 28 percent (85,000 tons) since the May report.

EGYPT: PRODUCTION OF PANEL PRODUCTS INCREASING

The wood panel products industry is relatively new to Egypt, according to the U.S. agricultural counselor in Cairo. Currently, one public sector and four private sector plants manufacture plywood, blockboard, and veneer from imported logs. Production for 1991 is forecast at 31,000 cubic meters (CUM), 1,000 CUM greater than a year ago. Plywood is available in thicknesses ranging from 3 to 22 millimeters. Although Egyptian plywood is costly and of relatively poor quality, domestic production is expected to represent 13 percent of total consumption by the end of 1991.

SOUTH AFRICA: FORESTRY SITUATION

According to the U.S. agricultural attache in Pretoria, the South African forestry sector has just completed a decade of spectacular growth despite the moderate downward trend that began in 1990. Production of wood and wood products currently accounts for 2.5 percent of South Africa's gross domestic product, up from 1.2 percent in 1980.

The 1991 timber harvest is forecast at almost 17.8 million cubic meters, slightly below the 1990 cut, due to generally poor economic conditions and reduced demand from domestic and export markets. Since there are few remaining virgin forests in South Africa, commercial plantations supply the bulk of the industry's raw material requirements. Commercial plantation area is estimated at approximately 1.2 million hectares, out of a total land area of 112.3 million hectares. Afforestation ranges from 30,000 to 31,000 hectares per year.

The economic slowdown is expected to lower softwood log production marginally. However, fellings of temperate hardwood logs are trending upward--an indication that the industry's three large private processors are cutting more Eucalyptus grandis and Wattle to expand their pulp and paper operations.

Production of softwood lumber is expected to increase slightly due to brisk demand for structural lumber. A downturn in production of temperate hardwood lumber reflects the fact that South Africa's main hardwood species, Eucalyptus and Wattle, are poorly suited for sawnwood production.

Production estimates are as follows in 1,000 cubic meters:

	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
HARVEST	18,536	17,979	17,773
Softwood Logs	4,353	4,684	4,675
Temperate Hardwood Logs	535	506	510
Softwood Lumber	1,793	1,734	1,750
Temperate Hardwood Lumber	220	202	200

1/ Preliminary.

COTE D'IVOIRE: FORESTRY SITUATION

The U.S. agricultural attache in Abidjan reports that production of wood and wood products during 1991 is expected to total nearly 3.4 million cubic meters (CUM), 5 percent below the 1990 volume. Log production, currently estimated at 2.4 million CUM, is expected to decline for the second consecutive year due to severe rains that impeded logging operations, a new government auction system for export quotas designed to reduce log exports, and stagnant demand for processed products. Lumber production is forecast at 715,000 CUM, a 5-percent reduction from a year ago. Lumber output is expected to continue trending downward in line with the Government's policy of limiting expansion in the sawmilling industry in order to exploit Cote d'Ivoire's comparative advantage in the production of veneer. The plywood industry has been in decline since 1988--a reflection of dwindling availability of raw material, a shortage of spare parts, and the slow rate of plant renovation. In contrast, the veneer industry has been expanding since 1985. Production in 1991 is forecast at a record 215,000 CUM due to generous log allocations, state-of-the-art equipment, and strong external demand.

Production is estimated as follows in 1,000 cubic meters:

	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
Tropical Hardwood Logs	2,588	2,543	2,567	2,549	2,400
Tropical Hardwood Lumber	759	784	747	753	715
Tropical Hardwood Veneer	164	179	197	206	215
Tropical Hardwood Plywood	45	53	44	42	39
Total	3,556	3,559	3,555	3,550	3,369

1/ Preliminary.

USSR: LIVESTOCK DEVELOPMENTS IN PERSPECTIVE

Soviet meat production has been in decline since the 1989 record year, but remains above the 1987 level due in part to herd culling.

Soviet cattle inventories reached 122.1 million head on January 1, 1987; however, at the start of 1991, numbers were down to 115.7 million head. Further reductions are expected this year and next. The rate of decline appears to be increasing; in 1989, cattle numbers fell by 1 million head. In 1990 reductions exceeded 2 million head while a decline of more than 3 million head is likely this year. Average carcass weights are also down about 5 percent due to reduced feed supplies and lower slaughter ages.

There has been an even sharper decline in sheep, with numbers falling at 5 million a year since 1990, compared to less than 2 million a year from 1987 to 1990. Projected 1992 inventories are at a 25-year low.

Soviet hog numbers reached 79.5 million head at the start of 1987, fell over 2 million head during the year and then increased during 1988 and 1989. Pork production continued to expand, due in part to higher carcass weights in 1988 and 1989. Since January 1, 1990, hog numbers have dropped more than 2 million head per year while carcass weights and pork production have declined. The reductions in Soviet inventories have been on state-owned farms while the small private sector has increased.

For the first half of 1991 procurements of all meat, including poultry, from state farms were only 88 percent of the 1990 level. This is apparently due, in part, to increased sales in private markets by both state and private farms. Private markets normally trade at significantly higher prices.

Soviet Livestock and Red Meat Production

	CATTLE	BEEF & VEAL	HOGS	PORK	SHEEP	SHEEP & GOAT MEAT
	1,000 HEAD	1,000MT	1,000 HEAD	1,000MT	1,000 HEAD	1,000MT
1987	122,103	8,288	79,500	6,324	142,210	905
1988	120,592	8,600	77,403	6,600	140,783	1,000
1989	119,580	8,800	78,143	6,700	140,684	1,000
1990	118,400	8,814	78,409	6,646	138,400	1,000
1991 <u>1/</u>	115,700	8,500	75,583	6,250	133,300	950
1992 <u>2/</u>	112,000	8,300	73,000	5,950	128,300	900

Source: U.S. Agricultural Counselor, Moscow, and Official Statistics.

1/ Preliminary. 2/ Forecast.

FEATURE COMMODITY ARTICLES

WORLD RED MEAT PRODUCTION

World ^{1/} red meat production for 1991 is projected at 119.2 million tons, down slightly from the March forecast, and on par with estimates for 1990. Although 1991 beef, sheep, and goat meat production forecasts have been increased since the March review, the forecast for world pork production has declined over 2 percent. For 1992, red meat production is projected to increase nearly 2 percent over 1991, with pork showing the largest absolute growth.

TABLE 1

World Red Meat Production (millions tons)

	<u>1989</u>	<u>1990</u>	<u>March</u> <u>1991</u>	<u>Sept.</u> <u>1991</u>	<u>Forecast</u> <u>1992</u>
Beef and Veal	48.4	48.5	47.9	48.2	49.0
Pork	63.4	64.7	66.0	64.6	66.0
Sheep/Goat meat	6.0	6.3	6.3	6.4	6.4
Total	117.8	119.5	120.2	119.2	121.3**

** Totals may not add due to rounding.

World 1991 beef and veal production is projected at 48.2 million tons, slightly less than the record high achieved in 1990. By the end of 1991, world cattle numbers are forecast down marginally, due to the pressure of herd reductions in the Soviet Union. In 1992, beef and veal production is forecast to increase 2 percent.

Herd rebuilding in the United States started in 1989, continued in 1990 with a 1.3-million-head increase and a 3.3-million-head increase is expected this year. U.S. beef production for 1991 is projected up 1 percent, despite cattle slaughter being projected below 1990 levels due to a 10 pound rise in average carcass weight. For 1992, U.S. beef production is forecast to rise another 1 percent due to high carcass weights, plus an increase in slaughter numbers.

In Mexico, improved rainfall this year has permitted some herd growth, compared to the drought-induced herd culling of 6 percent in 1990. Beef production for 1991 is projected down 13 percent. Mexican beef production in 1992 is projected to be slightly above 1991.

Increased slaughter has pushed Argentina's beef production for 1991 up to equal the 1990 output. However, the trend is forecast to reverse in 1992 with lighter carcass weights and lower slaughter reducing production by 2 percent. Argentine cattle numbers have stabilized at 50 million head. Increased taxes and domestic prices that were 30 percent lower in the first half of 1991 stifled most of the potential increase due to recent favorable weather.

^{1/} Beef, veal, pork, and sheep and goat meat production in selected countries.

EC beef production is projected to be up less than 1 percent this year, but it is forecast to fall slightly in 1992. Cattle numbers were down 1 percent in 1990 and a decline of 2 percent is expected in 1991. Total EC production is being affected by the 33-percent cut in the eastern German states' cattle herd as non-profitable operations are terminated. Surplus beef stocks remain high and current EC cattle prices are between 5 and 10 percent below last year's depressed levels.

In the Soviet Union, feed shortages have caused heavy herd culling in the socialized sector. Despite an increase in cattle slaughter, 1991 beef production is projected down 3 percent because of lower carcass weights. This trend of herd culling and lower beef production is expected to continue next year.

Australian cattle herds are expected to increase 2 percent during 1991 after a slight increase in 1990. Despite decreased competition from sheep and grain production, farmers lack the capital to expand herds to the extent they wish. Beef production is projected down 4 percent in 1991 due to reduced slaughter. Drought-induced culling in 1990 caused slaughter to increase by 9 percent.

World pork production is estimated at 64.6 million tons for 1991, virtually unchanged from 1990. Pork production in 1992 is forecast to increase 1.4 million tons. World hog numbers are expected to increase slightly this year following a similar gain in 1990. U.S. pork production for 1991 is estimated up 4 percent due to increased slaughter and carcass weights. A further 4-percent rise in production is forecast for 1992.

Mexican pork production for 1991 is projected up 3 percent, with an additional slight increase forecast in 1992.

EC pork production is projected to fall 4 percent in 1991 and remain at that level in 1992. This decline is concentrated in the eastern states of Germany, where a drastic reduction in hog numbers of almost 50 percent is occurring as part of the restructuring of the unprofitable and environmentally damaging socialist agricultural sector.

In Hungary, pork production is expected to continue to decline because of a weak domestic market, the collapse of the Soviet market, and reduced export subsidies. In Czechoslovakia, all meat production has declined due economic disruption in the conversion to a less regulated economic system. However, price changes now favor pork, which declined only 5 percent, over beef, which fell almost 14 percent. Depressed grain and potatoes prices have stimulated a 13-percent rise in pork production in Poland this year, but falling pork prices are expected to slow output growth next year.

Soviet hog numbers fell 4 percent during 1990 and a similar rate of decline is expected this year due to feed shortages. Virtually all losses occurred in the socialized sector. The reinvigorated private sector is growing, but at one-fifth of total production, does not counter the overall downward trend. Pork production is forecast down 6 percent this year and 5 percent next year.

Chinese pork production is projected up 2 percent for 1991, compared to a nearly 5 percent increase in 1990. Floods this year damaged the feed supply system, destroyed feed stocks and storage buildings, and drowned some hogs. Pork production in 1992 is forecast to increase 5 percent.

High levels of pork production are expected to continue in Taiwan for both 1991 and 1992, supported by strong demand from Japan.

World sheep and goat meat production in 1991 is estimated at 6.4 million tons, up 2 percent from last year. Production is forecast to fall slightly in 1992. World sheep numbers (excluding China) are expected to fall 4 percent during the current year, following a 2-percent drop in 1990. Most of the 1991 growth in meat production is due to higher slaughter in China and Australia.

Australian production is estimated up 8 percent because of continued heavy sheep slaughter in response to falling wool prices. As a result, Australian inventory numbers are expected to drop 11 percent during 1991. Sheep meat production in 1992 is expected to be down only slightly as low wool prices are expected to discourage sheep herd growth.

In China, sheep meat production is projected up 8 percent in 1991, with a further increase of 4 percent forecast for 1992. The expansion in both sheep meat and beef production in China is believed to be due to better management by livestock-producing households.

Sharp declines are reported in Soviet sheep numbers with sheep and goat meat production falling 5 percent this year and next, to a 25-year low.

New Zealand's sheep numbers were down 4 percent on June 30, 1991 (the start of the marketing year) and are forecast to fall slightly next year. Weak wool and lamb prices are major reasons for the reduction in inventories. Sheep meat production for 1991 is projected down slightly from last year and is expected to continue at that level into 1992.

Arthur Hausmann (202) 382-8883.

TABLE 10

RED MEAT PRODUCTION, SELECTED COUNTRIES 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Canada	2,164	2,058	2,024	2,120
Mexico	3,125	2,658	2,448	2,460
United States	17,963	17,594	17,997	18,399
NORTH AMERICA	23,252	22,310	22,469	22,979

Costa Rica	81	85	91	90
Dominican Republic	74	64	66	69
El Salvador	27	27	28	30
Guatemala	75	73	67	66
Honduras	24	23	22	22
CENTRAL AMERICA & CARIB.	281	272	274	277

Argentina	2,696	2,738	2,725	2,667
Brazil	4,750	4,450	4,700	5,400
Colombia	881	936	960	971
Peru	112	116	104	100
Uruguay	376	349	280	285
Venezuela	469	481	471	467
SOUTH AMERICA	9,284	9,070	9,240	9,890

Belgium/Luxembourg	1,150	1,100	1,211	1,185
Denmark	1,372	1,411	1,472	1,479
France	3,670	3,816	3,880	3,940
Germany	6,006	6,111	5,380	5,198
Greece	363	359	357	355
Ireland	639	728	792	829
Italy	2,515	2,583	2,582	2,584
Netherlands	2,134	2,198	2,178	2,208
Portugal	364	383	383	382
Spain	2,404	2,537	2,530	2,530
United Kingdom	2,326	2,336	2,364	2,404
EUROPEAN COMMUNITY	22,943	23,562	23,129	23,094

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 10 (Continued)

RED MEAT PRODUCTION, SELECTED COUNTRIES 1/
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Austria	617	629	635	627
Finland	280	303	302	290
Sweden	447	438	424	415
Switzerland	437	434	430	435
OTHER WEST EUROPE	1,781	1,804	1,791	1,767

Bulgaria	638	636	596	616
Czechoslovakia	1,458	1,406	1,295	1,294
Hungary	1,191	1,093	1,004	825
Poland	2,621	2,736	2,868	2,892
Romania	882	902	906	881
Yugoslavia	1,169	1,218	1,150	1,160
EAST EUROPE	7,959	7,991	7,819	7,668

U.S.S.R.	16,500	16,460	15,700	15,150

Israel	39	40	38	37
Saudi Arabia	25	28	30	40
Turkey	645	680	695	710
MIDDLE EAST	709	748	763	787

Egypt	464	489	502	508
South Africa	784	899	914	927
AFRICA	1,248	1,388	1,416	1,435

China	23,262	25,135	25,880	27,410
Hong Kong	30	20	20	19
India	2,407	2,438	2,380	2,468
Korea, South	610	572	601	626
Japan	2,142	2,104	2,060	2,080
Philippines	747	797	819	841
Singapore	75	76	77	79
Taiwan	923	1,014	1,025	1,025
ASIA	30,196	32,156	32,862	34,548

Australia	2,452	2,683	2,663	2,657
New Zealand	1,168	1,022	1,070	1,065
OCEANIA	3,620	3,705	3,733	3,722

TOTAL	117,773	119,466	119,196	121,317

1/ Includes Beef, Veal, Pork and Goat meat.

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 11

BEEF AND VEAL PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Canada	980	924	890	915
Mexico	2,140	1,790	1,550	1,555
United States	10,633	10,464	10,566	10,689
NORTH AMERICA	13,753	13,178	13,006	13,159
Costa Rica	81	85	91	90
Dominican Republic	60	51	52	54
El Salvador	27	27	28	30
Guatemala	61	59	53	52
Honduras	24	23	22	22
CENTRAL AMERICA & CARIB.	253	245	246	248
Argentina	2,600	2,650	2,640	2,580
Brazil	3,800	3,400	3,600	4,250
Colombia	741	795	823	839
Peru	112	116	104	100
Uruguay	376	349	280	285
Venezuela	337	382	370	362
SOUTH AMERICA	7,966	7,692	7,817	8,416
Belgium/Luxembourg	312	323	329	332
Denmark	205	202	210	207
France	1,670	1,753	1,800	1,850
Germany	1,963	2,112	2,080	1,950
Greece	82	82	80	76
Ireland	432	486	535	564
Italy	1,140	1,165	1,165	1,165
Netherlands	485	521	530	540
Portugal	120	112	111	110
Spain	451	513	502	480
United Kingdom	980	1,003	1,004	1,034
EUROPEAN COMMUNITY	7,840	8,272	8,346	8,308

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 11 (Continued)

BEEF AND VEAL PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	Forecast 1992
Austria	213	223	230	222
Finland	107	117	118	108
Sweden	139	145	149	146
Switzerland	157	164	165	167
OTHER WEST EUROPE	616	649	662	643

Bulgaria	136	137	126	126
Czechoslovakia	488	454	391	390
Hungary	108	110	111	100
Poland	729	838	714	690
Romania	210	212	230	230
Yugoslavia	309	352	300	303
EAST EUROPE	1,980	2,103	1,872	1,839

U.S.S.R.	8,800	8,814	8,500	8,300

Israel	39	40	38	37
Saudi Arabia	25	28	30	40
Turkey	270	310	330	350
MIDDLE EAST	334	378	398	427

Egypt	386	408	420	425
South Africa	582	661	678	691
AFRICA	968	1,069	1,098	1,116

China	1,072	1,256	1,430	1,610
India	1,847	1,868	1,801	1,883
Korea, South	124	131	130	135
Japan	548	549	570	575
Philippines	132	132	129	131
Taiwan	6	5	5	5
ASIA	3,729	3,941	4,065	4,339

Australia	1,565	1,718	1,640	1,645
New Zealand	550	470	526	521
OCEANIA	2,115	2,188	2,166	2,166

TOTAL	48,354	48,529	48,176	48,961

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 12

PORK PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	FORECAST 1992
Canada	1,184	1,134	1,134	1,205
Mexico	910	792	820	825
United States	7,173	6,965	7,267	7,543
NORTH AMERICA	9,267	8,891	9,221	9,573
Brazil	950	1,050	1,100	1,150
Colombia	140	141	137	132
Dominican Rep.	14	13	14	15
Guatemala	14	14	14	14
Venezuela	132	99	101	105
CENTRAL AND SOUTH AMERICA	1,250	1,317	1,366	1,416
Belgium/Luxembourg	831	770	876	847
Denmark	1,165	1,207	1,260	1,270
France	1,840	1,870	1,890	1,900
Germany	4,001	3,949	3,250	3,200
Greece	151	147	151	152
Ireland	144	157	162	168
Italy	1,295	1,333	1,330	1,330
Netherlands	1,636	1,661	1,630	1,650
Portugal	216	243	244	244
Spain	1,722	1,788	1,780	1,800
United Kingdom	978	962	982	996
EUROPEAN COMMUNITY	13,979	14,087	13,555	13,557
Austria	404	406	405	405
Finland	173	186	184	182
Sweden	308	293	275	269
Switzerland	280	270	265	268
OTHER WEST EUROPE	1,165	1,155	1,129	1,124
Bulgaria	424	422	400	420
Czechoslovakia	960	942	894	894
Hungary	1,079	970	893	725
Poland	1,870	1,870	2,122	2,185
Romania	600	620	600	575
Yugoslavia	791	799	785	790
EAST EUROPE	5,724	5,623	5,694	5,589
U.S.S.R.	6,700	6,646	6,250	5,950
China	21,228	22,811	23,300	24,600
Hong Kong	30	20	20	19
Korea, South	485	440	470	490
Japan	1,594	1,555	1,490	1,505
Philippines	615	665	690	710
Singapore	75	76	77	79
Taiwan	917	1,009	1,020	1,020
ASIA	24,944	26,576	27,067	28,423
Australia	302	319	325	335
New Zealand	44	43	42	41
OCEANIA	346	362	367	376
TOTAL	63,375	64,657	64,649	66,008

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 13

LAMB, MUTTON, GOAT MEAT PRODUCTION, SELECTED COUNTRIES
(1,000 METRIC TONS CARCASS-WEIGHT-EQUIVALENT)

	1989	1990	1991	FORECAST 1992
Mexico	75	76	78	80
United States	157	165	164	167
NORTH AMERICA	232	241	242	247
ARGENTINA	96	88	85	87
Belgium/Luxembourg	7	7	6	6
Denmark	2	2	2	2
France	160	193	190	190
Germany	42	50	50	48
Greece	130	130	126	127
Ireland	63	85	95	97
Italy	80	85	87	89
Netherlands	13	16	18	18
Portugal	28	28	28	28
Spain	231	236	248	250
United Kingdom	368	371	378	374
EUROPEAN COMMUNITY	1,124	1,203	1,228	1,229
Bulgaria	78	77	70	70
Czechoslovakia	10	10	10	10
Hungary	4	4	4	4
Poland	22	28	32	17
Romania	72	70	76	76
Yugoslavia	69	67	65	67
EAST EUROPE	255	256	257	244
U.S.S.R.	1,000	1,000	950	900
Egypt	78	81	82	83
South Africa	202	238	236	236
AFRICA	280	319	318	319
China	962	1,068	1,150	1,200
India	560	570	579	585
Korea, South	1	1	1	1
Turkey	375	370	365	360
MIDDLE EAST & ASIA	1,898	2,009	2,095	2,146
Australia	585	646	698	677
New Zealand	574	509	502	503
OCEANIA	1,159	1,155	1,200	1,180
TOTAL	6,044	6,271	6,375	6,352

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 14

CATTLE AND BUFFALO INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	Forecast 1992
Canada	11,016	11,147	11,198	11,400
Mexico	34,999	31,747	29,847	29,887
United States	98,065	98,162	99,436	102,690
NORTH AMERICA	144,080	141,056	140,481	143,977
Costa Rica	1,735	1,762	1,762	1,741
Dominican Republic	1,990	1,986	1,977	1,976
El Salvador	1,162	1,220	1,242	1,285
Guatemala	2,100	1,900	1,695	1,532
Honduras	2,457	2,424	2,388	2,356
CENTRAL AMERICA & CARIB.	9,444	9,292	9,064	8,890
Argentina	50,782	50,582	50,080	50,079
Brazil	130,500	130,850	131,275	130,700
Colombia	17,627	16,835	16,225	16,145
Peru	4,000	3,800	3,630	3,510
Uruguay	10,548	9,377	9,431	10,058
Venezuela	13,095	13,210	13,368	13,648
SOUTH AMERICA	226,552	224,654	224,009	224,140
Belgium/Luxembourg	3,174	3,259	3,378	3,382
Denmark	2,226	2,232	2,241	2,200
France	20,120	19,980	19,886	19,926
Germany	20,369	20,287	19,488	18,108
Greece	723	687	634	616
Ireland	5,637	5,899	6,029	6,180
Italy	8,843	8,853	8,578	8,222
Netherlands	4,606	4,731	4,830	5,000
Portugal	1,359	1,330	1,332	1,336
Spain	5,200	5,331	5,126	5,000
United Kingdom	11,902	11,922	11,845	11,821
EUROPEAN COMMUNITY	84,159	84,511	83,367	81,791

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 14 (Continued)

CATTLE AND BUFFALO INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	Forecast 1992
Austria	2,541	2,562	2,584	2,513
Finland	1,379	1,363	1,315	1,292
Sweden	1,676	1,697	1,660	1,612
Switzerland	1,850	1,855	1,829	1,827
OTHER WEST EUROPE	7,446	7,477	7,388	7,244

Bulgaria	1,615	1,577	1,524	1,512
Czechoslovakia	5,075	5,129	4,923	4,838
Hungary	1,690	1,598	1,571	1,500
Poland	10,322	10,143	9,024	8,600
Romania	6,416	6,283	5,952	5,754
Yugoslavia	4,759	4,705	4,527	4,600
EAST EUROPE	29,877	29,435	27,521	26,804

U.S.S.R.	119,580	118,400	115,700	112,000

Israel	191	190	186	184
Saudi Arabia	217	191	176	158
Turkey	13,400	12,700	12,200	11,700
MIDDLE EAST	13,808	13,081	12,562	12,042

Egypt	6,331	6,385	6,408	6,418
South Africa	12,675	13,398	13,512	13,585
AFRICA	19,006	19,783	19,920	20,003

China	97,950	100,752	105,000	108,500
India	267,620	270,150	272,710	271,437
Korea, South	2,039	2,051	2,125	2,220
Japan	4,682	4,760	4,863	4,878
Philippines	4,524	4,395	4,387	4,375
Taiwan	176	165	154	158
ASIA	376,991	382,273	389,239	391,568

Australia	23,938	24,233	24,300	24,800
New Zealand	8,058	7,828	8,065	8,235
OCEANIA	31,996	32,061	32,365	33,035

TOTAL	1,062,939	1,062,023	1,061,616	1,061,494

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 15

HOG INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	FORECAST 1992
Canada	11,018	10,737	10,608	10,780
Mexico	9,003	8,563	8,593	9,193
United States	55,469	53,852	54,462	58,000
NORTH AMERICA	75,490	73,152	73,663	77,973

Brazil	31,700	33,200	32,500	33,100
Colombia	2,393	2,434	2,398	2,369
Dominican Rep.	293	306	306	305
Guatemala	1,110	1,100	1,110	1,115
Venezuela	2,961	2,326	1,971	1,802
CENTRAL AND SOUTH AMERICA	38,457	39,366	38,285	38,691

Belgium/Luxembourg	6,306	6,510	6,341	6,421
Denmark	9,105	9,120	9,282	9,500
France	11,866	11,860	11,860	11,560
Germany	35,235	34,178	30,818	28,868
Greece	1,114	1,100	1,141	1,150
Ireland	961	999	1,069	1,099
Italy	9,360	9,261	9,119	9,050
Netherlands	13,820	13,638	13,788	13,600
Portugal	2,326	2,531	2,663	2,834
Spain	16,100	16,910	16,001	16,200
United Kingdom	7,626	7,383	7,379	7,423
EUROPEAN COMMUNITY	113,819	113,490	109,461	107,705

Austria	3,874	3,773	3,688	3,600
Finland	1,327	1,348	1,290	1,231
Sweden	2,264	2,264	2,170	2,143
Switzerland	1,869	1,787	1,723	1,678
OTHER WEST EUROPE	9,334	9,172	8,871	8,652

Bulgaria	4,132	4,352	4,340	4,390
Czechoslovakia	7,348	7,498	7,090	6,800
Hungary	8,327	7,660	8,000	7,400
Poland	19,605	18,685	19,739	21,500
Romania	14,350	11,659	13,929	15,000
Yugoslavia	7,396	7,231	7,358	7,360
EAST EUROPE	61,158	57,085	60,456	62,450

U.S.S.R.	78,143	78,409	75,583	73,000

China	342,220	352,810	362,410	365,000
Korea, South	4,852	4,801	4,528	4,558
Japan	11,866	11,816	11,335	11,500
Philippines	7,909	8,124	8,007	8,150
Taiwan	6,954	7,783	8,565	8,500
ASIA	373,801	385,334	394,845	397,708

Australia	2,766	2,765	1,881	1,076
New Zealand	414	380	395	405
OCEANIA	3,180	3,145	2,276	1,481

TOTAL	753,382	759,153	763,440	767,660

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

TABLE 16

SHEEP INVENTORIES, SELECTED COUNTRIES
(1,000 HEAD JANUARY 1)

	1989	1990	1991	FORECAST 1992
United States	10,858	11,363	11,200	10,900
Argentina	29,345	28,571	27,552	26,506
Belgium/Luxembourg	156	158	163	163
Denmark	86	100	111	125
France	11,500	11,500	11,500	11,595
Germany	4,098	4,136	3,239	2,879
Greece	10,694	10,150	9,759	9,694
Ireland	4,991	5,782	6,001	6,236
Italy	11,623	11,695	11,575	11,594
Netherlands	1,405	1,702	1,800	1,810
Portugal	3,187	3,347	3,413	3,543
Spain	23,797	25,447	24,037	25,000
United Kingdom	29,045	29,521	29,776	29,925
EUROPEAN COMMUNITY	100,582	103,538	101,374	102,564
Bulgaria	8,593	7,988	7,309	7,241
Czechoslovakia	1,047	1,051	1,087	1,087
Hungary	2,216	2,069	1,865	1,723
Poland	4,300	4,196	3,798	3,200
Romania	16,210	15,442	15,038	14,830
Yugoslavia	7,564	7,596	7,431	7,500
EAST EUROPE	39,930	38,342	36,528	35,581
U.S.S.R.	140,684	138,400	133,300	128,300
Egypt	3,451	3,534	3,554	3,439
South Africa	30,935	32,665	32,580	32,500
AFRICA	34,386	36,199	36,134	35,939
India	46,216	47,277	48,248	48,178
Turkey	45,700	45,300	45,000	44,600
MIDDLE EAST & ASIA	91,916	92,577	93,248	92,778
Australia	171,292	177,841	175,570	157,900
New Zealand	64,600	60,569	57,853	57,786
OCEANIA	235,892	238,410	233,423	215,686
TOTAL	683,593	687,400	672,759	648,254
China *	201,530	211,600	211,642	205,700
TOTAL	885,123	899,000	884,401	853,954

* Includes Goats In China.

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

SEPTEMBER 1991

WORLD ALMOND PRODUCTION

World commercial almond production during the 1991/92 season is forecast at 316,900 tons (shelled basis), 23 percent below last year's record of 412,900 tons. Crops in the United States, Greece, and Italy are expected to be substantially smaller than a year ago primarily due to adverse weather conditions during the growing season. Preliminary assessments indicate production will return to a more normal level in both Portugal and Spain. Record crops are forecast for Morocco and Turkey.

Almond production in the United States is forecast at 208,700 tons, 30 percent below the 1990/91 volume, and potentially the smallest U.S. crop since 1986. The decline reflects a combination of factors. Bearing acreage during the 1991/92 season is expected to drop to 409,000 acres, 2,000 acres less than last year. March rains eased the drought situation but resulted in widespread flower loss, particularly among the late blooming varieties. Cool weather in April caused a higher-than-normal nut drop and delayed maturity by 7-10 days. However, the cooler temperatures also dampened the impact of the water shortage and prevented serious disease and insect problems.

Almond production in Greece is expected to decline for the third consecutive year. The 1991/92 harvest is currently estimated at 11,000 tons, down 29 percent from a year ago due to inclement weather, declining area, and low producer prices. The most significant factor contributing to the decline was excessive rainfall during the blossoming stage that sharply reduced output in the two, main growing areas, Thessaly and Macedonia. Very low producer prices, coupled with parallel increases in production costs, further dampened growers' interest in almond cultivation this season. During the past few years, planted area has declined at an annual rate of 2 to 5 percent. New plantings have been minimal except for limited replacement of old trees with the new, more productive Feragnes variety. Given the current downward trend in the industry, the Government's target of an annual production volume of approximately 13-14,000 tons appears unrealistic.

Italy's 1991/92 almond crop is projected at 11,000 tons, 42 percent less than a year ago and potentially the third smallest harvest in the last 5 decades. Heavy spring rains and below normal temperatures inhibited pollination, adversely affected crop maturation, and delayed harvesting 2 to 3 weeks. However, kernel sizes are reportedly above average and of generally good quality. The long-term outlook for the Italian almond industry is bleak. Production has declined significantly during the last 25 years and uprootings continue unabated. Growers in Apulia and Sicily, the two largest growing areas, are gradually limiting almond production to only the most marginal, hilly, non-irrigated land. The more productive areas are now being planted to vegetables, table grapes, and citrus.

Spain's annual production of almonds is primarily determined by weather factors. A combination of rain, fog, and frosts during pollination and blooming resulted in a moderately poor set this season. However, preliminary assessments indicate the 1991/92 crop will total a respectable 55,000 tons, 10 percent larger than the 1990/91 harvest, but significantly below Spain's production potential of 80,000 tons. Quality and kernel size are reportedly good. Spain's almond area appears to have stabilized at 648,000 hectares, of which approximately 600,000 hectares are bearing and 60-70,000 are irrigated.

Orchards uprooted in marginal producing areas in the Levant have been balanced by new production areas in Murcia, Andalusia, and Aragon where farmers are experimenting with high-yield, frost-resistant varieties, modern farming techniques, and minimal irrigation use. Cultural practices, pest and disease control measures, and storage facilities have also improved in recent years despite rising production costs, labor shortages, and, until this season, low producer prices.

Almond production in Portugal is expected to rebound to 3,000 tons during the 1991/92 season, a 20-percent increase over last year. Crop quality is reportedly good, but below average rainfall stunted kernel sizes. Planted area appears stable at 42,000 hectares due, in large part, to a gradual orchard relocation process. Orchards in the traditional production centers in Tras-os-Montes and the southern Algarve are increasingly being replanted with citrus or olives, or zoned for construction. At the same time, new production areas are being opened and, thus far, have proven to be viable sites for modern industrial-scale plantations. Until recently, the almond industry was regarded as a sector in decline due to its numerous production problems. However, the long-term viability of the industry is expected to improve given the emergence of structured production zones, a shift to late flowering, high-yielding, disease resistant varieties, and new incentives and support measures activated by Portugal's acceptance of the 10-year, 2-stage EC-Accession regime.

Almond production in Turkey and Morocco has been trending upward for the past four years. Turkey is expected to harvest a record crop of 16,000 tons, up 7 percent from 1990/91 due to generally favorable growing conditions and a small increase in the number of bearing trees.

Current projections indicate Morocco's 1991/92 almond crop will total a record 12,200 tons, up 6 percent from a year ago due to optimum growing conditions, an increase in harvested area, and improved cultivation methods. The Ministry of Agriculture currently administers several programs designed to improve and expand almond area and production. The mainstay of these programs is the technical assistance and extension services provided to growers free of charge. A planting program, under the auspices of the Ministry of Agriculture and the Ministry of Interior, has boosted the total number of trees to an all-time high of 17.6 million, of which a record 13.4 million are bearing. The beneficial impact of these programs is evidenced not only by the steady growth in planted area, bearing tree numbers, and production, but by the growing number of intensive farms, the adoption of new, improved varieties, higher producer prices, and rising domestic demand.

TABLE 17. WORLD ALMOND PRODUCTION
(1,000 Metric Tons - Shelled Basis)

	1987/88	1988/89	1989/90	1990/91	1991/92	1/
Greece	8.5	19.0	17.2	15.5	11.0	
Italy	12.0	14.0	18.0	19.0	11.0	
Morocco	6.3	7.4	11.1	11.5	12.2	
Portugal	2.7	0.9	3.5	2.5	3.0	
Spain	65.0	40.0	80.0	50.0	55.0	
Turkey	10.0	14.0	15.0	15.0	16.0	
United States	299.4	267.6	222.3	299.4	208.7	
Total	403.9	362.9	367.1	412.9	316.9	

1/ Preliminary.

WORLD FILBERT PRODUCTION

Preliminary assessments indicate that record 1991/92 harvests in Italy and the United States will more than offset moderate production declines in Turkey and Spain. Combined output is currently forecast at 530,600 tons (inshell basis), 5 percent greater than a year ago.

Filbert production in Italy is forecast at a record 140,000 tons, 75 percent larger than the exceptionally poor outturn in 1990/91. Growing conditions were generally favorable despite heavy spring rains that delayed harvesting operations for 2 to 3 weeks.

The 1991/92 U.S. filbert crop is expected to reach an all-time high of 23,600 tons, up 20 percent from last year, and 6 percent above the previous record of 22,300 tons set during the 1985/86 season. The spring of 1991 was cooler and wetter than normal which delayed maturation of the crop by 7 to 10 days. Crop quality and kernel size were not affected and are reportedly above average.

Turkey, the world's leading commercial filbert producer, is expected to harvest a 1991/92 crop of 350,000 tons, a 10 percent reduction from last year, and significantly below the record 1989/90 output. With only marginal increases in planted area and bearing tree numbers, Turkey's annual crop is determined mainly by seasonal growing conditions. The 1991/92 season was unusually wet, particularly during the blossoming stage. Pollination was inhibited, resulting in a poor fruit set throughout the central Black Sea region. Better-than-average yields in the western growing areas partially compensated for the decline.

For the second consecutive year, drought plagued Spain's major filbert growing areas. As a result, the 1991/92 filbert crop is expected to decline 6 percent to a 7-year low of 17,000 tons. Crop quality reportedly ranges from fair to slightly below average. Rising production costs and low producer prices are discouraging many Spanish producers from using appropriate cultivation techniques and many orchards are showing signs of deterioration. Yields are already declining because of the persistent drought and poor orchard maintenance will probably result in further reductions. This would be unfortunate since, until recently, Spain's yields compared favorably to those in competing countries.

TABLE 18. FILBERT PRODUCTION
(1,000 Metric Tons - Inshell Basis)

	<u>1987/88</u>	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u> <u>1/</u>
Italy	90.0	140.0	140.0	80.0	140.0
Spain	32.0	17.5	25.0	18.0	17.0
Turkey	280.0	410.0	500.0	390.0	350.0
United States	19.8	15.0	11.8	19.7	23.6
Total	421.8	582.5	676.8	507.7	530.6

1/ Preliminary.

Bernadine Baker, (202) 382-8891

ASIAN FORESTRY SITUATION

CHINA: Roundwood production has been trending downward since 1988 due to declining domestic demand, the gradual depletion of large diameter logs, and the Government's continuing restrictions on the use of wood for construction. The 1991 harvest is forecast at 105.5 million cubic meters (CUM), down 4 percent from a year ago, and 18 percent below the record 1988 cut of 128.0 million CUM. China's eighth 5-year plan (1991-1995) calls for the expansion, protection, and more efficient utilization of domestic forestry resources. Expansion plans by the Ministry of Forestry (MOF) envision 4 to 5 million hectares of plantings per year. Assuming an 80-percent survival rate, the MOF projects that forested area will increase from 13 percent of China's total land area, or 124.7 million hectares, to 16 percent of total land area by the year 2000. To date, the bulk of these plantings have been fast-growing species that will quickly rebuild the forest base and provide a rapid return on investment. Protection measures include stricter efforts to enforce the annual cutting quota, and greater emphasis on large scale afforestation projects that serve as shelterbelts as well as future timber resources. To ensure efficient utilization of its remaining, commercially viable resources, the Government is committed to eliminating all non-essential uses of wood. Current policy requires substitution with products such as steel, iron, or plastic whenever possible.

Constraints caused by Government harvesting limitations, declining stocks of commercially usable logs, and increasing labor costs are expected to reduce China's 1991 output of softwood and temperate hardwood logs and lumber. Total lumber production remains limited by domestic milling capacity, and Government policies favoring the upgrade and expansion of integrated processing facilities for panel products. Plywood production continues to expand, although the emphasis has shifted to upgrading quality rather than expanding production capacity. The production of artificial board products, particularly medium density fiberboard, oriented strand board and particleboard, is one area that represents an ideal opportunity for the industry to improve wood utilization. Chinese board products are manufactured primarily from wood residues rather than wood chipped explicitly for that purpose. The MOF estimates that the equivalent of 13 million CUM of wood have been saved by the introduction of new technologies and state-of-the-art manufacturing lines that use wood waste to produce high quality board products. The MOF target is to increase production of all panel products by 15 percent annually. Output of panel products during 1991 is expected to exceed 2.7 million CUM, slightly above the 1990 volume, but well below the 15 percent target.

TABLE 19. CHINA FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991 1/</u>
HARVEST	119,080	109,500	105,500
Softwood Logs	73,850	67,890	65,500
Temperate Hardwood Logs	45,230	41,610	40,000
Softwood Lumber	18,290	17,650	17,030
Temperate Hardwood Lumber	9,850	10,819	10,400
Railroad Ties/Sleepers	1,200	1,300	1,400
Softwood Plywood	580	590	600
Temperate Hardwood Plywood	145	145	150
Fiberboard	1,443	1,494	1,500
Particleboard	442	458	460

1/ Preliminary.

INDONESIA: Heightened international concern over depletion of the world's tropical rain forests, coupled with the economic necessity of ensuring a sustainable supply of raw material for its own downstream wood products industries, has prompted the Indonesian Government to implement policies designed to effectively manage and protect its forest resources. Estimates of the rate of deforestation vary, but Indonesia appears to be losing approximately 1.0 million hectares of forest each year through the combined effects of logging, expansion of agricultural areas, and conversion of land for other development projects. The Government's commitment to arrest the depletion of its timber base, and improve forest management techniques, is being accomplished through reforestation programs, implementation of a selective felling system, Government incentives for planting timber estates, closer supervision of concession holders' activities, and stricter enforcement of the U.S.\$10.00 per cubic meter reforestation tax.

In an effort to manage log production, the Department of Forestry has set a maximum allowable cut of 32 million CUM per year, well below the industry's annual logging capacity of 48 million CUM. Hardwood log production for 1991 is forecast at 26.5 million CUM, slightly below the 1990 harvest, but 17 percent smaller than the allowable cut, due to the reforestation tax, higher export taxes on sawn timber, a ban on new concession licenses, and stricter enforcement of concession regulations.

Indonesia's milling capacity is approximately 18.4 million CUM. Production of hardwood lumber during 1991 is forecast at 8.4 million CUM, down 7 percent from a year ago, and significantly below the industry's installed capacity. Tighter log supplies and an export tax on sawn timber have been instrumental in changing the composition of log use between sawmill and plywood plants. Now, nearly 70 percent of Indonesia's annual log harvest is consumed by the plywood industry. During 1991, plywood production is expected to total 9.6 million CUM, an impressive volume compared to the 279,000 CUM produced in 1977. Current assessments indicate steady, but slower growth in the plywood industry over the next several years given the harvesting cap and the present moratorium on start-ups of new plywood plants.

Particleboard production is forecast to increase for the second consecutive year to 320,000 CUM. Currently, there are 7 particleboard mills with a combined production capacity of 400,000 CUM per year, competing for waste products from the plywood and sawmill industries. Future output is expected to be tempered by static production of wood chips and slack domestic demand resulting from high commercial interest rates.

TABLE 20. INDONESIA FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
Tropical Hardwood Logs	28,000	27,000	26,500
Tropical Hardwood Lumber	10,371	9,000	8,400
Railroad Ties/Sleepers	18	15	15
Tropical Hardwood Plywood	8,784	9,250	9,600
Tropical Hardwood Veneer	31	44	60
Particleboard	300	310	320

1/ Preliminary.

JAPAN: There are approximately 24.6 million hectares of forest land in Japan encompassing a growing stock of nearly 3.0 billion CUM. Total forest area has remained relatively stable over the past 30 years, but there has been a marked increase in area devoted to plantation forests vis-a-vis natural growth forests. Japanese forestry enterprises are small and generally operate under consignment from forest owners, the majority of which cut less than 1,000 CUM per year. For the past decade, Japan's forest owners increasingly have faced financial difficulties due to poor productivity, low stumpage prices, de-population of forest areas, and an aging workforce.

Production of softwood and temperate hardwood logs has been trending downward since 1988 primarily due to a steady rise in labor costs associated with harvesting domestic logs. The decline in temperate hardwood logs has been more pronounced because of raw material shortages, escalating prices for Hokkaido hardwoods, and quality characteristics that make Japan's hardwood species better suited for chip and pulp production rather than more profitable products like lumber or plywood.

Total sawnwood production for 1991 is forecast at 28.6 million CUM, down 4 percent from the 1990 volume of 29.8 million CUM. The reduction in mill output reflects the declining availability of domestic and imported logs, a slowdown in housing starts, and weak demand from the furniture industry.

The panel products industry is the only processing sector expected to record modest gains during 1991. To supplement declining production of temperate and tropical hardwood veneers, manufacturers began increasing output of softwood veneer in 1987. Production of softwood veneer sheets during 1991 is forecast at a record 220,000 CUM, up 14 percent from a year ago. For the past several years, domestic plywood manufacturers have devoted more processing capacity to the production of softwood plywood. Reportedly, the industry target is to increase the production share of softwood plywood to 30 percent of total domestic plywood production over the next five years, with a further increase to 50 percent by the year 2002. More moderate gains are projected for board products. Current assessments indicate expansion will be concentrated in the particleboard and medium density fiberboard sectors.

TABLE 21. JAPAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
HARVEST	30,515	29,300	30,000
Softwood Logs	17,175	16,775	16,500
Temperate Hardwood Logs	2,446	2,219	2,100
Poles/Piles/Posts/Pitprops	403	368	350
Softwood Lumber	27,067	26,551	25,500
Temperate Hardwood Lumber	1,524	1,365	1,300
Tropical Hardwood Lumber	1,890	1,865	1,800
Softwood Veneer	170	193	220
Temperate Hardwood Veneer	199	178	160
Tropical Hardwood Veneer	7,307	6,924	6,500
Softwood Plywood	195	216	230
Temperate Hardwood Plywood	234	219	210
Tropical Hardwood Plywood	6,277	6,304	5,800
Hardboard	150	145	140
Medium Density Fiberboard	237	264	275
Insulation Board	518	528	525
Particleboard	1,092	1,072	1,080

1/ Preliminary.

REPUBLIC OF KOREA: Despite what is widely recognized as one of the most successful reforestation programs in the world, Korea remains highly dependent on imports to meet its raw material requirements. Total forest land is relatively stable at 6.5 million hectares. Current assessments place the total volume of standing timber at 234.0 million CUM. However, three-quarters of this timber is less than 30 years old. Annual roundwood production capacity is estimated at approximately 1.6 million CUM. The 1991 timber cut is forecast at 1.2 million CUM, up 7 percent from a year ago, but 34 percent below capacity because most trees are red pine and, thus, commercially unsuitable for downstream processing into lumber or plywood. Efforts by the Forestry Administration to increase utilization of domestic timber in value-added processing have been marginal because of poor tree quality, and the fact that less than 5 percent of pine stocks and less than 2 percent of the other major species are over 30 centimeters in diameter. Therefore, the bulk of the annual cut is usable mainly for pitprops and pulpwood. Korea's reforestation program has increased the total growing stock and improved erosion control, but has failed to expand supplies of commercially usable timber.

Strong growth in the Korean economy, coupled with the current domestic construction boom, is expected to boost 1991 output of lumber and panel products manufactured from imported logs. Record production levels are expected for softwood lumber, temperate and tropical hardwood lumber, hardboard and medium density fiberboard. Modest gains are forecast for tropical hardwood plywood and particleboard. Board products are Korea's growth sector for the 1990's. One major particleboard plant intends to expand its facilities by the end of 1992, and two additional plants are scheduled to open by the end of 1993. As a result, total processing capacity is expected to triple within the next two years. By the end of 1991, Korea reportedly will have four, fully operational medium density fiberboard plants with a combined annual production capacity of 339,000 CUM. Hardboard production more than doubled between 1989 and 1990. Output in 1991 is expected to increase 24 percent to 67,000 CUM.

TABLE 22. KOREAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	1989	1990	1991	1/
HARVEST	1,227	1,138	1,220	
Softwood Lumber	2,978	3,481	3,800	
Temperate Hardwood Lumber	39	47	55	
Tropical Hardwood Lumber	1,219	1,350	1,400	
Tropical Hardwood Plywood	1,180	1,199	1,200	
Hardboard	25	54	67	
Medium Density Fiberboard	85	113	170	
Particleboard	164	165	170	

1/ Preliminary.

TAIWAN: Timber production continues to decline due to the inaccessibility of remaining timber stands, rising logging costs, local labor shortages, conservation and environmental concerns, and cheaper imports of logs and wood products. Domestic timber supplied less than 3 percent of Taiwan's raw material requirements in 1990, and is expected to contribute even less in 1991. The 1991 timber cut is forecast at 100,000 CUM, down 12 percent from last year, and 73 percent below the Government's maximum allowable cut of 365,000 CUM. Production of hardwood lumber and panel products is expected to continue trending downward in 1991. However, production of softwood lumber is forecast to increase by 11 percent over 1990 due to increased local demand for construction materials and interior wood products.

TABLE 23. TAIWAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
HARVEST	157	114	100
Softwood Lumber	56	36	40
Temperate Hardwood Lumber	676	574	500
Tropical Hardwood Lumber	227	170	160
Tropical/Temperate Hardwood Veneer	929	865	850
Tropical/Temperate Hardwood Plywood	583	469	400
Particleboard	110	105	90

1/ Preliminary.

MALAYSIA: In recent years, Malaysia has been accused of indiscriminate and excessive logging of its tropical rain forests. In response to this criticism, the Federal Government revised its domestic forest policy to include tighter controls on logging, improvements in forest management, better utilization of rubberwood supplies, and the establishment of additional commercial forest plantations.

Production prospects for the 1991 season appear favorable. Malaysia's tropical timber industry is expected to record gains in all major sectors. The 1991 timber harvest is forecast at 40.0 million CUM, up 3 percent from a year ago, but 2 percent below the record cut in 1989. Tropical hardwood log production is expected to rebound 2 percent, to 39.5 million CUM. Tighter restrictions on log exports, Government efforts to expand downstream processing, and greater demand from domestic and export markets, is expected to boost production of tropical hardwood lumber, plywood and veneer. Current forecasts for lumber and plywood indicate record production levels of 8.8 million CUM and 1.3 million CUM, respectively.

TABLE 24. MALAYSIAN FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
HARVEST	40,812	39,066	40,000
Tropical Hardwood Logs	40,392	38,655	39,520
Tropical Hardwood Lumber	8,382	8,560	8,880
Tropical Hardwood Plywood	1,007	1,270	1,300
Tropical Hardwood Veneer	429	500	540
Poles/Piles/Posts/Pitprops	420	445	480
Particleboard	95	110	120

1/ Preliminary.

THE PHILIPPINES: Productivity within the Philippine forestry sector has been trending downward since 1988. The 1991 timber cut is forecast at a record low 2.3 million CUM, down 8 percent from last year, and just under the 1991 allowable cut of 2.385 million CUM set by the Department of Environment and Natural Resources (DENR).

Current assessments indicate that total forest cover in the Philippines is 4.2 million hectares. Virgin forest is estimated at only 800,000 hectares, down 100,000 hectares from 1989. Of the 3.4 million hectares of residual forest, about 1.9 million hectares of regrowth forest have had sufficient regeneration, or were logged lightly enough in the first cut, to be considered productive forest with a sustainable annual production volume of approximately 3.0 million CUM. The remaining 1.5 million hectares are largely non-productive.

On average, 120,000 hectares of forest are denuded every year. A reforestation target level is set annually by the DENR. The target level for 1990 was 150,000 hectares. Actual replantings totaled a record 191,663 hectares. Currently, there is some concern as to the viability of these plantings given the extended dryness experienced from late 1990 through May of 1991.

Beginning January 1, 1992, logging in virgin forests will be strictly prohibited. Approximately one-half of this area is located within concessions belonging to existing Timber License Agreement (TLA) holders. In an effort to better manage its forest resources, the DENR has been gradually reducing the number of TLA holders. As of May 1991, there were only 63 TLA holders, down from 142 in 1986. The DENR's original target was to reduce the total number of TLA holders to 30 by the end of 1991. However, this target has been revised upward to 50 to encompass those TLA holders who have evidenced a strong commitment to proper forest management.

To date, the Government has not resolved the major issue confronting the domestic forest industry--the proposed ban on commercial logging. Delays in enacting the necessary legislation stem from disagreement within the Congress as to whether the final bill should stipulate a "total" logging ban with harvesting restricted to tree plantations, or a "selective" ban with harvesting permitted in all areas identified as having more than 40 percent forest cover. Whichever type of logging ban is imposed, it appears probable that production levels will continue to decline. Preliminary forecasts indicate output of tropical hardwood logs, lumber, and veneer will drop to an all-time low in 1991. The absence of a definitive resolution to the proposed ban has brought investment in logging and wood processing to a standstill. In order to compete on world markets, Philippine sawmills and processing plants desperately need investment funds to upgrade equipment and improve product quality.

TABLE 25. THE PHILIPPINES FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991</u> <u>1/</u>
HARVEST	3,217	2,500	2,300
Tropical Hardwood Logs	3,147	2,400	2,200
Tropical Hardwood Lumber	975	774	700
Tropical Hardwood Plywood	353	467	400
Tropical Hardwood Veneer	65	50	45

1/ Preliminary.

MYANMAR: The 1991 harvest is forecast at 31.3 million CUM, the bulk of which is fuelwood. Production of teak logs is forecast at 706,000 CUM, 17 percent above the Government's 1991 allowable cut of 603,000 CUM, but 5 percent less than the 1990 volume, due to declining reserves in the State's main producing areas of Pegu, Mandalay, and Sagaing. Fellings of teak logs from the Thai concession areas are expected to increase during 1991, but not enough to offset the smaller-than-anticipated harvest from the State's reserve forests. Overcutting of teak will probably continue as long as the Government's top priority is to maximize foreign exchange earnings.

Myanmar's timber reserves boast numerous other exotic tropical hardwoods, the most important of which are pyinkado, inn-kanyin, and padauk. Production of these non-teak hardwood logs is expected to exceed 3.6 million CUM in 1991, up 8 percent from last year. The Government set the 1991 allowable cut for non-teak hardwoods at 4.1 million CUM. Although fellings are expected to be 11 percent below target, they are rapidly approaching the sustainable limit. Production levels reportedly will continue to rise as Government policies increasingly mandate the substitution of exotic hardwoods for teak.

Sawnwood production for 1991 is forecast at 423,000 CUM, a 19 percent increase over 1990. Output of lumber, veneer and plywood processed from teak and other hardwoods is expected to rise in line with strong demand from domestic and overseas markets.

TABLE 26. MYANMAR FORESTRY PRODUCTION
(1,000 Cubic Meters)

	<u>1989</u>	<u>1990</u>	<u>1991</u> 1/
HARVEST	29,533	30,692	31,303
Teak Logs	729	747	706
Non-Teak Hardwood Logs	2,406	3,391	3,661
Teak Sawnwood	99	122	141
Non-Teak Hardwood Sawnwood	187	233	282

Bernadine Baker, (202) 382-8891.

FIELD TRIP REPORT ON SOVIET SPRING WHEAT SITUATION

A team led by the USDA traveled in the primary Soviet spring wheat regions of Kazakhstan and West Siberia during mid-August. The itinerary included the major spring wheat producing areas of the New Lands, including regions of the Kazakhstan Republic (Kustanay and Tselinograd oblasts) and West Siberia (Altay Kray). The objective of the team was to assess 1991 Soviet Spring Wheat production and to study grain production methodologies in the spring wheat areas. The team traveled under the auspices of the U.S.-U.S.S.R. Agreement on Cooperation in the Field of Agriculture.

Information obtained by crop observations and discussions with producers supported the USDA September estimate of 85.5 million tons for Soviet 1991 total wheat production. Soviet officials and farm managers reported that the area sown to grains this year is nearly identical to last year and is expected to stabilize after falling since the late 1970's. Crop conditions varied dramatically between and within areas visited, reflecting this season's severe drought and scattered rainfall. Spring wheat was in poor-fair condition in most areas with higher yields observed as the team traveled further north and east. West Siberia and Kazakhstan account for approximately 60 percent of the total Soviet spring wheat crop. Spring wheat accounts for roughly 30 percent of all Soviet wheat production.

The prospect of selling grain to the Government (procurement) was viewed with uncertainty by producers for the second year in a row. Procurements of grain by the State have been proceeding slowly, with sales, as of early September, reaching only 31 million tons with a 1991 procurement target of 77 million. The USDA team encountered little enthusiasm from State and collective farm managers relative to the hard-currency-for-grain program. Barter seems to be a way of life for many operations as a means to obtain desired products. Although many decrees have been announced by officials in Moscow, implementation has been difficult and life down on the Sovkhoz appears to go on as it has in the past.

Observations

- o Discussions with the Ministry of Agriculture in Moscow indicated that 1991 would be an average grain production year for the Soviet Union, with spring grains being reduced from 1990.
- o The total area sown to all grains this year was indicated to be nearly identical to last year and is expected to stabilize after falling since the late 1970's.
- o The Ministry reported that next year's (1992/93) winter crops area is expected to reach 40 million hectares, up from the 1991 level of 35 million.
- o Good agronomic principles were being applied everywhere observed; however, weeds were a problem in some locations due to the lack of herbicides.
- o The spring wheat production regions visited did not report any significant shortage of fuel this year; however, they did report a shortage of quality plant protectants.

- o Standard wheat varieties, dating from the 1950's, are still dominant due to their drought tolerance. The team noted that newer varieties are only slowly being accepted by farm managers.
- o Research in Kazakhstan shows little advantage in employing fallow rotation over simple good management, such as deep plowing, snow retention, balanced fertilizer application, and the use of proper plant protectants.
- o Four basic methods for weed control were observed in the New Lands: narrow row spacings, deep tillage practices, tall varieties, and crop rotations.
- o The land privatization program is proceeding slowly in the areas visited.
- o USDA satellite imagery analysis and meteorological data were strongly supported by the team's ground truth assessment of spring wheat yields.

Moscow

- o Officials provided details concerning the reduced prospects for the 1991 spring wheat crop.
- o This summer's drought in the New Lands was considered by many to be the worst in recent history. Many areas received little or no rain from May until mid-July.
- o The all-grain area for 1991 is nearly identical to last year.
- o The Ministry stated that the general trend in crop area across the New Lands is for more forage and less spring wheat area.
- o The shortage of quality plant protectants this year is primarily due to insufficient hard currency to pay for imports.

West Siberia

- o Spring wheat conditions looked the best here of all locations visited, with an estimated yield for the oblast reported at 1.2 tons per hectare.
- o The season was dry in the west and south, and wet in the east, with the city of Barnaul being the dividing point.
- o No shortage of fuel or fertilizers was reported in this region.
- o Direct combining is gaining popularity over the traditional 2-stage (swath/combine) method. Yield gains of up to 10 percent have been reported.
- o New seed often is often purchased only once every 3-5 years.

- o The low average annual precipitation precludes intensive fertilizer application and often inhibits fertilizer efficiency. Some wheat operations apply fertilizer only once every 2-4 years.
- o Fodder crop experimentation, with unexpectedly good results at this latitude, was evident. Early maturing corn and sorghum varieties from Krasnodar, Moldavia, Hungary, and Yugoslavia are being tested.
- o Lack of adequate on-farm storage facilities is a problem here as well as in most areas visited.

Kazakhstan

- o A severe drought sharply reduced yield prospects for this year's spring wheat crop. Little or no rain reportedly fell from the May planting period through the reproductive period in mid-July.
- o Grain production in Kazakhstan reportedly will be down sharply from last year's bumper harvest of 28.5-million-tons (dry-weight basis) and will be one of the lowest in recent history.
- o Local officials indicated that there will be sufficient grain to meet Kazakhstan's internal requirements. Kazakhstan has prohibited the sale of grain outside its borders.
- o The decision of many farm managers to delay spring wheat sowing by 5-10 days and plant at a deeper depth generally is paying off in terms of higher yields and will allow some areas to harvest an average crop.
- o For spring wheat, narrow (6-inch) row spacing, extremely high seeding rates, and seeding with disc drills were observed as efforts to shade the ground and thus combat weeds.
- o Topsoil organic matter content may be expected to decline should current cultivation practices continue. These practices include disc drilling (requiring minimal surface residue), deep tillage, and the removal of crop residue for use as livestock feed.
- o In mid-August, spring wheat was about 10-14 days from harvest. The growth stage was milky ripe to soft dough.
- o Extremely variable crop conditions were observed. Yield estimates by team members and local officials for spring wheat ranged from 0.5 tons to 1.0 tons per hectare.
- o More grain is being held on-farm due to a lack of confidence in the economy, despite inadequate storage facilities.

- o Snow retention practices during the winter are of great importance in northern Kazakhstan, where a reported 80 percent of the moisture needed during the wheat vegetative period is derived from snow-melt.
- o There was no reported shortage of fuel supplies.
- o The lack of plant protectants was discussed. Weedy fields were observed.

John Phillips (202) 475-5138.
Mark Lindeman (202) 475-5143.

TABLE 27

Kazakhstan Total Grains: Area, Yield, and Production

Year	Area Harvested	Yield	Production
	(MILLION HECTARES)	(TONS PER HECTARE)	(MILLION TONS)
1980	25.3	1.09	27.5
1981	25.6	0.93	23.8
1982	25.4	0.77	19.5
1983	25.3	0.92	23.2
1984	25.4	0.62	15.7
1985	25.1	0.85	21.3
1986	24.6	1.15	28.3
1987	24.5	1.12	27.4
1988	24.3	0.93	22.6
1989	23.8	0.85	20.2
1990	23.4	1.33	31.2

Production figures are on a bunker-weight basis.

TABLE 28

USSR: TOTAL GRAIN PRODUCTION AND PROCUREMENT BY REPUBLIC /1

1986 - 1990

(1,000 METRIC TONS)

REPUBLIC	PRODUCTION					PROCUREMENTS--	
	1986	1987	1988	1989	1990	AVG 86-90	% OF TOTAL
RSFSR	117,968	109,084	102,807	112,360	127,000	113,844	53.5
UKRAINE	43,063	50,184	47,388	54,900	53,200	49,747	23.4
MOLDAVIA	2,044	2,011	3,052	3,538	2,600	2,649	1.2
BELORUSSIA	7,041	9,281	6,922	7,900	8,200	7,869	3.7
KAZAKHSTAN	28,306	27,444	22,560	20,200	31,200	25,942	12.2
BALTICS:	6,164	6,897	5,050	6,324	6,800	6,247	2.9
LITHUANIA	3,155	3,554	3,046	3,537	3,600	3,378	1.6
LATVIA	1,850	2,086	1,413	1,715	2,000	1,813	0.9
ESTONIA	1,159	1,257	591	1,072	1,200	1,056	0.5
TRANS-CAUCASUS:	2,035	2,057	2,504	1,607	2,400	2,121	1.0
GEORGIA	638	664	714	535	700	650	0.3
ARMENIA	331	274	373	214	300	298	0.1
AZERBAIDZHAN	1,066	1,119	1,417	858	1,400	1,172	0.6
CENTRAL ASIA:	3,447	4,443	4,775	4,071	4,400	4,227	2.0
UZBEK	1,248	1,822	2,200	1,607	2,000	1,775	0.8
KIRGIZ	1,633	1,909	1,758	1,714	1,600	1,723	0.8
TADZHIK	246	359	382	322	300	322	0.2
TURKMEN	320	353	435	428	500	407	0.2
TOTAL USSR	210,068	211,401	195,058	210,900	235,800	212,645	100.0
						68,237	100.0

/1 PUBLISHED SOVIET DATA

SEPTEMBER 1991

PRODUCTION ESTIMATES & CROP ASSESSMENT DIVISION, FAS, USDA

COTE D'IVOIRE GRAIN PRODUCTION

Total 1991/92 grain production in the Cote d'Ivoire is estimated at a record 1.36 million tons, up 5 percent or 60,000 tons from last year. The area devoted to d'Ivoire's food grains has increased more than 50 percent since the early 1980's. Total grain area reached a record 1.42 million hectares this year. Government initiatives to achieve self-sufficiency in domestic food grain production have led to area and production increases for rice, corn, millet, and sorghum. Ivorian rice production has increased nearly 75 percent since 1980. Corn production has increased more than 40 percent since 1980 with millet and sorghum output rising more than 60 percent in the same period. However, in spite of Government efforts, increases in grain production continue to be offset by the rising demands of a growing urban population.

RICE

The Cote d'Ivoire is expected to produce a record 0.73-million-ton (rough-basis) rice crop in 1991/92, due to an estimated record planted area and improved yields. Since 1980, the Government has implemented various programs aimed at boosting production by increasing planted area and providing technical assistance to farmers. In 1985, the Government undertook emergency actions to attain self-sufficiency in rice production. In spite of some initial success, high production costs and low-cost rice imports have tended to constrain continued output increases. In addition, financial problems faced by the Government have forced the suspension of free seed distribution to farmers. Instead, seed is sold to farmers at subsidized prices and fertilizer is provided free only to irrigated farms.

Area expansion and improved yield prospects for rice are expected to boost production during 1991/92; however, the decision to suspend the free supply of seed may moderate the increase. Many farmers planted this year's rice crop with seed left from prior harvests rather than purchasing quality seed. Another deterrent to further long-term production increases is harvest loss due to bird damage. Yield losses to birds reportedly average 20 percent each year.

Both upland and irrigated rice are produced in the Cote d'Ivoire, with upland rice accounting for 95 percent of the total area cultivated. Rice planting extends from April through July. Harvest begins in September and continues through December. Upland rice production is concentrated in areas where rainfall is adequate and well distributed, including the north and north-west savannah, the western forest zone, the Center-West, and the South. Irrigated rice is produced in areas of minimal or irregular rainfall, e.g., the Northeast and central Cote d'Ivoire at the transitional zone between savannah and forest.

Rice production has increased in recent years as a result of Government-sponsored technical direction, infrastructure improvements, and increased use of high yielding seed. Additional Government efforts include modernizing the production system, rehabilitating and equipping irrigated areas, and cultivating lowland areas and large plains. The emphasis of upland rice policy is on the establishment of optimal cultivation dates, regionalization of rice varieties, and reclamation of water logged lands. Irrigated rice policy focuses on the rehabilitation of existing hydroelectric projects, expansion of the area under technical supervision, and construction of additional dams.

CORN

Corn production for 1991/92 is estimated at 0.54 million tons, up from 0.49 million last year. Corn is produced throughout the Cote d'Ivoire, with the primary production areas in the northern half of the country. The main corn crop is planted from March to June and harvested from July through October. A secondary crop is planted in August and harvested in December. Ivorian soils are relatively fertile, allowing for the limited use of fertilizers, which are expensive and difficult to obtain. Cultivation is done predominantly by human labor, with some use of draft animals.

Production has increased steadily over the past decade as the Government has encouraged area expansion, increased area under technical supervision, established a favorable official producer price, and improved storage facilities. Several obstacles exist which limit corn production potential. Corn is produced for human consumption and as a feed grain. The demand for mixed feed has been low because of financial instability within the poultry industry, and locally produced corn often fails to meet the quality requirements established by mixed feed producers. Growth in the corn sector is also limited because of market restrictions. Corn export markets are few because neighboring countries, which were potential export markets, are now generally self-sufficient.

The goal of the Government corn policy is to improve productivity, marketing, and the promotion of industrial processing. The minimum producer price for corn has remained the same since July 1988. High storage costs and inadequate storage facilities has led small farmers to sell at a lower price during harvest to avoid quality deterioration. The Government has traditionally provided free seed to farmers, but, this practice was suspended this year. Seed is currently sold to farmers at subsidized prices.

MILLET AND SORGHUM

Millet production for the 1991/92 crop year is estimated at 59,000 tons, up 4 percent from last year due to an attractive market price, favorable early season rainfall, and area expansion. Sorghum production, which is estimated at 34,000 tons, up 6 percent from 1990/91, is also expected to rise based on increased area and favorable weather. Millet and sorghum are produced primarily in the savannah belt of northern Cote d'Ivoire. Planting is underway in May and continues until July. Harvest occurs between September and December. Producers utilize traditional management practices and receive little technical supervision. Both millet and sorghum have low priority in the Government's food production program and are produced as subsistence crops, although surplus grain is frequently marketed. Both are produced mainly for human consumption and are processed as a local food paste or traditional beer.

AGRICULTURAL PROFILE

Agriculture contributes roughly 30 percent of the Cote d'Ivoire's gross domestic product and provides employment for more than 50 percent of the population. Cote d'Ivoire is a major exporter of specialty crops such as cocoa, coffee, rubber, palm oil, and cotton. Cocoa and coffee production generate the majority of Cote d'Ivoire's export earnings, and the country's economy has been seriously affected by falling world market prices for these commodities. Cote d'Ivoire is self-sufficient in the production of most food crops such as cassava, millet, sorghum, and yams, although imported rice is needed to supplement local production. The area planted to rice has risen steadily during recent years. However, demands from a growing urban population have outpaced production increases, creating the need for continued imports.

The Ivorian government has traditionally been involved in virtually all facets of agriculture. Recently, however, serious economic problems have led the Government to liberalize the economy and to privatize some State-run agencies. The primary goals of current policy include: developing rural areas, modernizing agricultural activities, increasing food crop production (especially rice and corn), assuring favorable guaranteed producer prices, and promoting investment in agriculture.

Brenda Pressnall (202) 475-5139.

TABLE 29

Cote d'Ivoire Grains

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92f
<i>(1,000 hectares)</i>												
AREA HARVESTED												
RICE (rough)	360	340	350	380	411	420	509	540	595	620	630	640
CORN	468	490	520	550	595	533	600	590	640	650	620	650
MILLET	54	58	56	54	63	66	66	72	74	75	80	83
SORGHUM	36	34	35	33	37	36	36	38	44	45	46	48
TOTAL GRAINS	918	922	961	1017	1106	1055	1211	1240	1353	1390	1376	1421
<i>(metric tons per hectare)</i>												
YIELD												
RICE (rough)	1.17	1.15	1.29	0.95	1.25	1.29	1.10	1.11	1.16	1.15	1.15	1.15
CORN	0.81	0.82	0.83	0.75	0.87	0.90	0.70	0.70	0.81	0.82	0.79	0.82
MILLET	0.63	0.55	0.54	0.48	0.65	0.61	0.61	0.63	0.65	0.68	0.71	0.71
SORGHUM	0.58	0.56	0.54	0.52	0.62	0.61	0.61	0.61	0.66	0.69	0.70	0.71
TOTAL GRAINS	0.93	0.91	0.97	0.80	0.99	1.03	0.86	0.87	0.95	0.95	0.95	0.96
<i>(1,000 metric tons)</i>												
PRODUCTION												
RICE (rough)	421	390	451	359	514	541	561	598	691	711	725	734
CORN	380	400	430	410	520	480	420	415	520	530	490	535
MILLET	34	32	30	26	41	40	40	45	48	51	57	59
SORGHUM	21	19	19	17	23	22	22	23	29	31	32	34
TOTAL GRAINS	856	841	930	812	1098	1083	1043	1081	1288	1323	1304	1362

CHART 1

COTE D'IVOIRE GRAINS

AREA HARVESTED AND PRODUCTION



EAST EUROPEAN GRAIN PRODUCTION

Eastern Europe is projected to produce a total grain crop of 98.4 million tons for 1991, up 4.8 million or 5 percent from last year, but 5.3 million below the record 1984 harvest. Production trended upward throughout the 1970's and early 1980's, and peaked at a record 103.7 million tons in 1984. Over the past 7 years, production has fluctuated between 90.7 and 101.0 million tons. Harvested area, however, declined 3.1 million hectares since the early 1970's.

Eastern Europe, which is comprised of Albania, Bulgaria, Czechoslovakia, Hungary, Poland, Romania, and Yugoslavia, is expected to produce a wheat crop of 39.4 million tons in 1991, down 1.7 million or 4 percent from last year's record crop. Wheat is the largest grain crop produced in Eastern Europe making up roughly 40 percent of total grain production from 38 percent of total area planted to grains. Wheat area has generally fluctuated between 9 and 10 million hectares for the past 30 years while yields have steadily improved from a low of 1.62 tons per hectare in 1960 to a high of 4.32 in 1990. By comparison, the 1991 wheat yield in the European Community (EC) is estimated at 5.25 tons per hectare.

Coarse grain production in Eastern Europe for 1991 is estimated at 58.8 million tons, up 6.6 million or 13 percent from last year, but 6.5 million below the record 1984 harvest. Coarse grain area has trended downward since the early 1960's. Yields, however, have improved over the same period to a high of 3.83 tons per hectare in 1984 before slipping to an estimated 3.28 last year. Yields are expected to rebound because of improved weather in 1991, but remain well below peak levels. The EC's 1991 coarse grain average yield is estimated at 4.66 tons per hectare.

Rice production in Eastern Europe is relatively small and is estimated at 0.2 million tons (milled-basis) for 1991, down marginally from last year.

Albania

Total grain production in Albania is estimated at 0.9 million tons in 1991, marginally above last year. Area has changed little during the past 30 years, fluctuating between 0.3 and 0.4 million hectares. Grain crops cover almost 80 percent of the arable land, with wheat and corn being the most important crops. Wheat, which is produced in the central and northern regions, is estimated to total 0.5 million tons, unchanged from last year. Wheat area has remained in the 180,000 to 200,000 hectare range for the past ten years while yields have changed little over the same period. Corn production for 1991 is estimated at 0.4 million tons. Corn area has trended downward since the early 1960's; however, higher yields have more than made up for the decline in area and are expected to reach 4.0 tons per hectare this year.

Albania's soils and climate are most strongly influenced by the sharp topographic break between the western lowland strip and the surrounding mountains. Roughly 20 percent of the total land area is considered arable. The most fertile regions of the western lowlands are the provinces of Lushnja and Fieri, and the river valleys and basins of central and eastern Albania. The lowland area is characterized by a mild climate with winter temperatures generally above freezing. The cool, maritime summers are usually quite dry and most precipitation falls in the autumn and winter. These conditions are well suited to the production of winter grains. Irrigation in Albania is negligible.

Bulgaria

Total grain production in 1991 is estimated at 7.7 million tons, down marginally from last year and down 2.3 million from the record 1982 crop. Grain area has ranged from 2.5 to 1.8 million hectares since the early 1960's. Wheat production for 1991 is estimated at 4.3 million tons, down 0.8 million from last year and 1.1 million below the record 1989 crop. Harvested area has remained relatively constant for the past 10 years and has changed little since the early 1960's. Yields have demonstrated an upward trend since 1960 and have averaged 4.2 tons per hectare over the past 5 years. Wheat normally makes up more than half of the total grain area.

Coarse grain production is estimated at 3.3 million tons, up 0.6 million from last year, but down 1.7 million from the 1982 record of 5.0 million. Corn and barley are the major coarse grains produced, accounting for an estimated 1.9 and 1.3 million tons, respectively, in 1991. Corn output has been trending downward since the early 1980's due to reduced area and poorer yields. Barley production generally has been in the 1.0 to 1.7 million for range since 1970. Barley area and yields have shown large year-to-year fluctuations, but area is down from the mid-1970's while yields are up.

Bulgaria's climate is moderately continental but regionally variable. Frequent summer droughts, capable of causing severe yield fluctuations, have necessitated the extensive use of irrigation. Fertile soils and a varied climate, however, make the cultivation of a wide variety of crops possible. Wheat is grown nearly everywhere except in the extreme southwest, while corn is cultivated primarily in the northern third of the country.

Czechoslovakia

Total grain production in 1991 is estimated at 12.0 million tons, down approximately 0.4 million from last year's record. Harvested area has been declining slowly since the early 1970's. Yields have fluctuated but demonstrated a slight upward trend over the same period, resulting in a production level that generally has fluctuated between 10-12 million tons. Arable lands make up 40 percent of the total land area and grains cover slightly more than half of the cropped area.

Wheat and barley are Czechoslovakia's major grains and are produced primarily in the Elbe valley, the Moravian valleys, and the Slovakian lowlands. Wheat production for 1991 is estimated at 6.5 million tons, down 3 percent from last year's record. Wheat area has fluctuated relatively little for the past two decades while yields have improved steadily, finally leveling off at a 5.1 ton per hectare average over the past five years. Barley production is concentrated primarily in western Slovakia. Production for 1991 is estimated at 3.6 million tons, about 0.5 million below last year's record. Harvested area over the past three decades has fluctuated between 0.7 and 1.0 million hectares. During the past five years, barley area has returned to pre-1975 levels of between 0.7 and 0.8 million hectares. Yields have improved steadily since the early 1960's and have a 1986-90 average of 4.6 tons per hectare.

Hungary

Grain production for 1991 is estimated at 14.5 million tons, up 2.1 million from last year, but below the record of 15.5 million in 1984. Wheat and corn are the main grain crops in Hungary and together occupy roughly 82 percent of the estimated grain area.

Corn is Hungary's major crop with production for 1991 estimated at 6.7 million tons, up sharply from last year's drought-reduced harvest of 4.5 million. Corn yields improved steadily until the early 1980's, then leveled off and have fluctuated within the 5.5 to 6.7 tons per hectare range throughout the past decade. Harvested area has declined slightly from the level of the mid-1970's.

Wheat production for 1991 is estimated at 5.9 million tons from an area of 1.2 million hectares. While wheat area is estimated up 3 percent, production is down 4 percent from last year, and 20 percent below the record 1984 harvest. The condition of winter wheat and rye this year was better than the average of previous 5 years. Damage to winter grains this year was less than expected, despite extremely low temperatures in February. Freezing of standing water usually is the main cause of winterkill in Hungary and relatively low soil moisture during the first half of the winter resulted in less damage than normal. Rye production in Hungary is small at 0.2 million tons for 1991.

Barley production for 1991 is estimated at a record 1.6 million tons, up 0.3 million from last year. Some of the recently introduced, high-yielding winter barley varieties apparently are not as tolerant to freeze damage as the older varieties. Spring barley, on the other hand, has benefited from favorable weather, resulting in estimated total barley yields this year of 4.56 tons per hectare, second only to the record 4.68 produced in 1989.

Poland

Polish total grain output for 1991 is estimated at 27.4 million tons, down 0.6 million or 2 percent from last year's record crop. Area planted to grains has fluctuated only slightly during the past 15 years. Grain yields, which have a 10-year average of 3.0 tons per hectare, have shown some improvement in the past three years.

Wheat is the leading grain crop in Poland, surpassing rye in 1986. Wheat production for 1991 is estimated at 9.0 million tons, virtually unchanged from last year's record. Total coarse grain production is estimated at 18.4 million tons, down 0.6 million from last year's record. Rye production for 1991 is expected to reach 8.5 million tons, down 4 percent from 1990. Barley production for 1991 is projected at 4.2 million tons, unchanged from last year, but only 0.2 million tons below the record set in 1986.

Small grains -- wheat, rye, and barley -- are well suited to Poland's cool, moist climate and short summer growing season. Most grains are grown in a broad east-west zone in central Poland, which represents about 40 percent of all cultivated land. Wheat area is estimated to account for 28 percent of total 1991 grain area, and rye 35 percent. Wheat is more commonly grown in the south and production has risen at the expense of rye and oats. Oats tend to predominate on the soils of the northern lake region, and barley is concentrated in the central and southeastern areas. Virtually all barley grown in Poland is spring-planted, versus only a quarter of the wheat being spring grown.

Polish soils require fertilizers to achieve satisfactory yields. About 50 percent of Polish soils have a low phosphorous and potash content. Over 70 percent of the soils are light, and about 60 percent require regular liming. Basic crop production inputs are quite expensive. Falling grain prices caused fertilizer purchases for the 1991 crop to decline significantly last autumn. Purchases of plant protection chemicals also have been reduced from the 1989 level due to high prices. Reduced use of fertilizers and plant protection agents will likely contribute to lower yields for the 1991 crop.

Romania

Total grain production in Romania for 1991 is estimated at 18.9 million tons, up 1.0 million from last year, but down substantially from the record 1984 crop of 23.6 million. Grain harvested area has fluctuated between 5.6 and 6.5 million hectares during the last two decades.

Corn is the major grain produced in Romania followed, by wheat and barley. Corn production for 1991 is estimated at 8.5 million tons, up 1.0 million from last year, but down sharply from the record 13.3 million set in 1984. Corn yields improved steadily throughout the 1960's and 1970's, reaching a record 4.57 tons per hectare in 1982. Since then, corn yields trended downward and have averaged 3.4 tons per hectare over the past 5 years.

Wheat production is estimated at 7.0 million tons for 1991, down 0.3 million from last year and 1.4 million below the record set in 1988. Wheat yields have declined slightly from the record 3.5 tons per hectare produced in 1988. Wheat is produced throughout Romania, with the southern, eastern, and extreme western plains having the best agronomic conditions. Mostly soft and semi-hard winter wheat varieties are produced, with some hard wheat produced on the eastern plains. Barley production is projected at 3.0 million tons, up 0.3 million from last year because of higher area and yields. Barley yields trended upward over the past three decades, reaching a record 4.43 tons per hectare in 1989. Yields for 1991 are down from this high but above the 1986-1990 average. Poor crop management practices and the lack of timely input applications have negatively affected yields for all grains in recent years.

Romania's agricultural sector has been undergoing significant changes over the past few years. Land reform has been a major topic throughout 1990 and was finally adopted in March 1991. Originally, land was to be re-distributed in early May; however, a decision was made to delay the action until this fall. Many households have proceeded, nevertheless, to cultivate their own small plots, which may result in labor shortages on the collective farms later in the year. The most significant occurrence in 1990 was the liberalization of farmers' markets and the abolition of forced State marketing. State institutions this year have provided little assistance to the newly created "free markets", leading to excessive supplies in local areas, but unsatisfied distant demand.

Yugoslavia

Yugoslav total grain output for 1991 is estimated at 17.0 million tons, up 3.0 million from last year, but down 8 percent from the record 1986 crop. Harvested area has shown a downward trend since the early 1960's; however, higher yields generally have offset the lower area. Corn and wheat are the dominant grains produced, followed by barley and small amounts of rye, oats, sorghum, and rice.

Corn production for 1991 is estimated at 9.7 million tons, up sharply from last year's 6.6 million. Corn area has changed little over the last two decades while yields improved throughout this period until their peak with the record 5.3 tons per hectare in 1986. Yields have since declined to roughly 4.2 tons per hectare except for 1988 and 1990, both drought years.

Wheat area has shown a downward trend since the late 1960's, but yield gains have more than offset the area losses. Production this year is estimated at 6.2 million tons, down 2 percent from last year's record. Reduced soil moisture last fall prevented farmers from completely sowing their wheat during the optimal period (October 1-25) and in the southern area, most of the crop was planted after the optimal period. Abnormally warm weather and frequent rainfall during December and January enabled the crop to enter winter in good condition. Generally favorable weather throughout the spring and summer months promoted this year's near record output.

Grain production in Yugoslavia is primarily concentrated in the Pannonian Plains in the northeast, including parts of Croatia and Vojvodina. This region has a continental climate with variable rainfall patterns and contains the country's most fertile soils.

Allen Vandergriff, Economist (202) 382-8882.
Jay Kress, Geographer (202) 475-5142.

EAST EUROPEAN GRAIN PRODUCTION

(1000 METRIC TONS)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 SEP
Albania										
Wheat	524	583	600	575	560	560	540	540	450	450
Barley	25	30	30	30	30	30	35	35	35	35
Corn	342	366	360	360	360	360	400	400	380	400
Rye	8	10	12	12	11	11	10	10	12	12
Coarse Grains	405	436	432	432	431	431	475	475	457	477
Total Grains	929	1019	1032	1007	991	991	1015	1015	907	927
Bulgaria										
Wheat	4913	3600	4836	3068	4327	4149	4743	5402	5095	4300
Barley	1436	1047	1279	800	1144	1091	1313	1568	1345	1345
Corn	3418	3115	2994	1350	2848	1858	1557	2421	1241	1850
Rye	34	31	37	49	50	45	50	45	45	45
Coarse Grains	4939	4224	4336	2241	4085	3036	2974	4080	2677	3282
Total Grains	9927	7898	9244	5364	8488	7261	7793	9558	7848	7658
Czechoslovakia										
Wheat	4606	5820	6170	6023	5305	6154	6550	6356	6715	6500
Barley	3654	3276	3677	3538	3530	3551	3400	3550	4051	3550
Corn	941	722	940	1114	992	1160	950	1000	508	880
Rye	583	751	710	620	547	496	530	708	729	650
Coarse Grains	5669	5224	5812	5695	5479	5607	5240	5588	5702	5480
Total Grains	10275	11044	11982	11718	10784	11761	11790	11944	12417	11980
Hungary										
Wheat	5751	5968	7367	6578	5793	5748	6975	6509	6159	5900
Barley	865	1008	1208	1046	857	794	1170	1324	1300	1550
Corn	7752	6256	6514	6818	7261	7234	6028	6747	4530	6650
Rye	115	136	192	166	172	186	245	200	226	223
Coarse Grains	8850	7518	8065	8163	8416	8313	7577	8401	6214	8553
Total Grains	14649	13534	15465	14789	14257	14109	14600	14944	12419	14499
Poland										
Wheat	4476	5165	6010	6461	7502	7942	7582	8462	9026	9000
Barley	3647	3262	3555	4086	4412	4335	3804	3909	4217	4217
Corn	68	64	57	69	113	146	204	244	290	250
Rye	7792	8781	9540	7600	7074	6816	7232	8620	8765	8450
Coarse Grains	16690	16935	18382	17281	17534	17101	16922	18496	18988	18412
Total Grains	21166	22100	24392	23742	25036	25043	24504	26958	28014	27412
Romania										
Wheat	6465	5220	7578	5665	6700	6000	8400	7800	7300	7000
Barley	3052	2193	2448	1850	1950	1800	3000	3400	2700	3000
Corn	12620	11982	13274	10500	12000	10500	10000	9000	7500	8500
Rye	40	40	50	50	60	50	60	78	68	70
Coarse Grains	15823	14314	15890	12510	14180	12470	13250	12654	10513	11820
Total Grains	22334	19618	23579	18313	21057	18624	21810	20522	17876	18880
Yugoslavia										
Wheat	5218	5524	5595	4839	4776	5272	6300	5599	6359	6219
Barley	669	661	748	704	703	504	615	702	692	700
Corn	11126	10719	11293	9896	12526	8863	7697	9415	6616	9700
Rye	84	83	81	77	74	69	76	75	72	75
Coarse Grains	12152	11716	12382	10933	13569	9671	8646	10474	7663	10758
Total Grains	17412	17280	18013	15808	18393	14991	14983	16100	14062	17009
East Europe										
Wheat	31953	31880	38156	33209	34963	35825	41090	40668	41104	39369
Barley	13348	11477	12945	12054	12626	12105	13337	14488	14340	14397
Corn	36267	33224	35432	30107	36100	30121	26836	29227	21065	28230
Rye	8656	9832	10622	8574	7988	7673	8203	9736	9917	9525
Coarse Grains	64528	60367	65299	57255	63694	56629	55084	60168	52214	58782
Total Grains	96692	92493	103707	90741	99006	92780	96495	101041	93543	98365

TABLE 31

EAST EUROPEAN GRAIN AREA

(1000 HECTARES)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 SEP
Albania										
Wheat	195	189	190	190	190	190	180	180	180	180
Barley	12	13	13	13	13	13	13	13	13	13
Corn	92	87	90	90	90	90	95	95	100	100
Rye	10	11	11	11	11	11	12	12	12	12
Coarse Grains	134	131	134	134	134	134	140	140	145	145
Total Grains	329	320	324	324	324	324	320	320	325	325
Bulgaria										
Wheat	1059	1128	1126	1067	1127	1085	1182	1138	1163	1100
Barley	352	323	315	260	318	295	345	360	360	360
Corn	621	596	542	435	573	497	490	563	400	475
Rye	23	25	26	32	30	30	30	30	30	30
Coarse Grains	1040	979	907	757	950	851	893	980	817	892
Total Grains	2115	2123	2049	1837	2093	1952	2091	2134	1996	2008
Czechoslovakia										
Wheat	1073	1192	1209	1221	1213	1217	1250	1241	1241	1250
Barley	967	822	790	799	821	840	820	752	743	750
Corn	183	204	235	224	217	220	215	204	140	220
Rye	176	203	197	182	156	142	155	175	171	170
Coarse Grains	1498	1383	1362	1331	1303	1322	1305	1233	1145	1240
Total Grains	2571	2575	2571	2552	2516	2539	2555	2474	2386	2490
Hungary										
Wheat	1310	1355	1361	1358	1318	1301	1281	1242	1121	1150
Barley	262	277	270	279	253	205	264	283	297	340
Corn	1130	1102	1107	1053	1118	1144	1103	1084	1070	1119
Rye	74	72	75	85	89	94	97	97	92	93
Coarse Grains	1516	1499	1496	1461	1501	1483	1506	1506	1507	1594
Total Grains	2839	2867	2870	2834	2834	2799	2799	2760	2640	2756
Poland										
Wheat	1456	1537	1707	1885	2025	2132	2179	2195	2281	2375
Barley	1236	1099	1054	1242	1335	1286	1250	1175	1174	1255
Corn	16	17	15	16	22	32	40	51	45	50
Rye	3273	3448	3545	3083	2760	2647	2874	2924	3063	3000
Coarse Grains	6638	6571	6452	6319	6213	5940	6259	6181	6236	6255
Total Grains	8094	8108	8159	8204	8238	8072	8438	8376	8517	8630
Romania										
Wheat	2151	2232	2360	2355	2530	2400	2400	2350	2250	2200
Barley	943	741	672	680	575	560	750	768	750	800
Corn	2764	2935	3091	3090	3000	2900	2900	2800	2500	2350
Rye	40	42	35	40	40	42	40	40	35	35
Coarse Grains	3850	3804	3881	3891	3695	3582	3777	3725	3439	3343
Total Grains	6022	6064	6274	6284	6270	6029	6225	6124	5729	5581
Yugoslavia										
Wheat	1558	1609	1458	1348	1346	1455	1506	1479	1495	1533
Barley	284	280	271	264	267	213	222	242	245	250
Corn	2246	2264	2331	2400	2369	2218	2269	2268	2213	2300
Rye	53	51	47	44	42	41	40	37	38	38
Coarse Grains	2762	2766	2805	2862	2834	2614	2668	2693	2637	2730
Total Grains	4329	4384	4272	4219	4189	4079	4183	4178	4141	4269
East Europe										
Wheat	8802	9242	9411	9424	9749	9780	9978	9825	9731	9788
Barley	4056	3555	3385	3537	3582	3412	3664	3593	3582	3768
Corn	7052	7205	7411	7308	7389	7101	7112	7065	6468	6614
Rye	3649	3852	3936	3477	3128	3007	3248	3315	3441	3378
Coarse Grains	17438	17133	17037	16755	16630	15926	16548	16458	15926	16199
Total Grains	26299	26441	26519	26254	26464	25794	26611	26366	25734	26059

September 1991

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 32

EAST EUROPEAN GRAIN YIELDS

(TONS PER HECTARE)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 SEP
Albania										
Wheat	2.69	3.08	3.16	3.03	2.95	2.95	3.00	3.00	2.50	2.50
Barley	2.08	2.31	2.31	2.31	2.31	2.31	2.69	2.69	2.69	2.69
Corn	3.72	4.21	4.00	4.00	4.00	4.00	4.21	4.21	3.80	4.00
Rye	0.80	0.91	1.09	1.09	1.00	1.00	0.83	0.83	1.00	1.00
Coarse Grains	3.02	3.33	3.22	3.22	3.22	3.22	3.39	3.39	3.15	3.29
Total Grains	2.82	3.18	3.19	3.11	3.06	3.06	3.17	3.17	2.79	2.85
Bulgaria										
Wheat	4.64	3.19	4.29	2.88	3.84	3.82	4.01	4.75	4.38	3.91
Barley	4.08	3.24	4.06	3.08	3.60	3.70	3.81	4.36	3.74	3.74
Corn	5.50	5.23	5.52	3.10	4.97	3.74	3.18	4.30	3.10	3.89
Rye	1.48	1.24	1.42	1.53	1.67	1.50	1.67	1.50	1.50	1.50
Coarse Grains	4.75	4.31	4.78	2.96	4.30	3.57	3.33	4.16	3.28	3.68
Total Grains	4.69	3.72	4.51	2.92	4.06	3.72	3.73	4.48	3.93	3.81
Czechoslovakia										
Wheat	4.29	4.88	5.10	4.93	4.37	5.06	5.24	5.12	5.41	5.20
Barley	3.78	3.99	4.65	4.43	4.30	4.23	4.15	4.72	5.45	4.73
Corn	5.14	3.54	4.00	4.97	4.57	5.27	4.42	4.90	3.63	4.00
Rye	3.31	3.70	3.60	3.41	3.51	3.49	3.42	4.05	4.26	3.82
Coarse Grains	3.78	3.78	4.27	4.28	4.20	4.24	4.02	4.53	4.98	4.42
Total Grains	4.00	4.29	4.66	4.59	4.29	4.63	4.61	4.83	5.20	4.81
Hungary										
Wheat	4.39	4.40	5.41	4.84	4.40	4.42	5.44	5.24	5.49	5.13
Barley	3.30	3.64	4.47	3.75	3.39	3.87	4.43	4.68	4.38	4.56
Corn	6.86	5.68	5.88	6.47	6.49	6.32	5.47	6.22	4.23	5.94
Rye	1.55	1.89	2.56	1.95	1.93	1.98	2.53	2.06	2.46	2.40
Coarse Grains	5.84	5.02	5.39	5.59	5.61	5.61	5.03	5.58	4.12	5.37
Total Grains	5.16	4.72	5.39	5.22	5.03	5.04	5.22	5.41	4.70	5.26
Poland										
Wheat	3.07	3.36	3.52	3.43	3.70	3.73	3.48	3.86	3.96	3.79
Barley	2.95	2.97	3.37	3.29	3.30	3.37	3.04	3.33	3.59	3.36
Corn	4.25	3.76	3.80	4.31	5.14	4.56	5.10	4.78	6.44	5.00
Rye	2.38	2.55	2.69	2.47	2.56	2.57	2.52	2.95	2.86	2.82
Coarse Grains	2.51	2.58	2.85	2.73	2.82	2.88	2.70	2.99	3.04	2.94
Total Grains	2.62	2.73	2.99	2.89	3.04	3.10	2.90	3.22	3.29	3.18
Romania										
Wheat	3.01	2.34	3.21	2.41	2.65	2.50	3.50	3.32	3.24	3.18
Barley	3.24	2.96	3.64	2.72	3.39	3.21	4.00	4.43	3.60	3.75
Corn	4.57	4.08	4.29	3.40	4.00	3.62	3.45	3.21	3.00	3.62
Rye	1.00	0.95	1.43	1.25	1.50	1.19	1.50	1.95	1.94	2.00
Coarse Grains	4.11	3.76	4.09	3.22	3.84	3.48	3.51	3.40	3.06	3.54
Total Grains	3.71	3.24	3.76	2.91	3.36	3.09	3.50	3.35	3.12	3.38
Yugoslavia										
Wheat	3.35	3.43	3.84	3.59	3.55	3.62	4.18	3.79	4.25	4.06
Barley	2.36	2.36	2.76	2.67	2.63	2.37	2.77	2.90	2.82	2.80
Corn	4.95	4.73	4.84	4.12	5.29	4.00	3.39	4.15	2.99	4.22
Rye	1.58	1.63	1.72	1.75	1.76	1.68	1.90	2.03	1.89	1.97
Coarse Grains	4.40	4.24	4.41	3.82	4.79	3.70	3.24	3.89	2.91	3.94
Total Grains	4.02	3.94	4.22	3.75	4.39	3.68	3.58	3.85	3.40	3.98
East Europe										
Wheat	3.63	3.45	4.05	3.52	3.59	3.66	4.12	4.14	4.22	4.02
Barley	3.29	3.23	3.82	3.41	3.52	3.55	3.64	4.03	4.00	3.82
Corn	5.14	4.61	4.78	4.12	4.89	4.24	3.77	4.14	3.26	4.27
Rye	2.37	2.55	2.70	2.47	2.55	2.55	2.53	2.94	2.88	2.82
Coarse Grains	3.70	3.52	3.83	3.42	3.83	3.56	3.33	3.66	3.28	3.63
Total Grains	3.68	3.50	3.91	3.46	3.74	3.60	3.63	3.83	3.63	3.77

Get The Answers Fast:

Did Bolivia Boost Barley Imports?

Does Portugal Produce Pears?

Did Egypt Export Eggs? Will Nigeria

Need More Nuts? How Does Foreign Fruit

Fare in France? Are Apples Allowed Into Australia?

How Much Cotton Does Canada Cultivate? Will More Meat

Move Into Mexico? Did Denmark Demonstrate a Demand for Duck?

Is Beer a Big Export for Brazil? Does Tunisia Tariff Tobacco? How Well

Does Guatemalan Grain Grow? Does India Import Indigo? Has Belgium Banned

Bacon at its Borders? Does Poland Process Potatoes? Are Peanuts Protected in

Paraguay? Is Sesame Significant in Senegal? Does Côte d'Ivoire Consume Cocoa?

Has Pakistan's Pork Production Picked Up? How Much Lamb Do Libanians Like? Does Bangladesh

Butt Briskets of Beef? Or Does Portuguese Produce Pears? Is Japan Sugar Shipped From Overseas?

Does Cambodia Can Coffee? How Much Protein Does Peru Produce? How Many Tons of Singapore

Harvest? Turkey's Turkey Meat? How Many Tons of Sugar? How Many Tons of Wheat?

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